

## Beneficiary gifts honor mothers and daughters in support of breast cancer breakthroughs

Lydia Schoenfeld's family has been deeply touched by breast cancer. Her grandmother fought it; her older sister, Marlene Lynn Schoenfeld, survived it; and sadly, her younger sister, Iris Rona Schoenfeld, succumbed to it. It was awful for Lydia to see her sisters face this difficult disease, as well as the toll it took on her mother.

"I watched cancer overcome my sister, Iris, and saw how this loss affected our mother. It had an enormous impact on me," Lydia said. "No mother should see her daughter go through such pain."

In honor of the strong women in her life, and in memory of her sister, Iris, and Iris' best friend, Peggy Green, Lydia has made a generous provision in her estate plans to support breast cancer research at Dana-Farber Cancer Institute.

After Iris passed, Lydia knew she wanted to contribute to breast cancer research. She learned about Dana-Farber through her own detective work and a recommendation from a friend.

"I wanted to give to a dynamic place and I learned that Dana-Farber was the best of the best," she said. "The physician-scientists at Dana-Farber are humble geniuses and compassionate individuals; their hearts and their minds are in this."

Lydia decided to name Dana-Farber as a beneficiary of her investment, bank, and retirement accounts because it was a straightforward and simple way to make gifts that didn't require an attorney. It gives her peace of mind to know that these funds will continue to grow as she continues to work and invest, ultimately having greater impact.

"I hope my gifts can be a game-changer to help Dana-Farber scientists move forward in women's breast cancer research and treatment. Breast cancer is a



Lydia Schoenfeld's generous beneficiary designations will support Dana-Farber's breast cancer research in memory of her younger sister, Iris Rona Schoenfeld, pictured here. Iris was an accomplished equestrian and horse trainer.

devastating disease to both the patients and their families," Lydia said.

Lydia's foresight and generosity creates a legacy she is proud of and will help Dana-Farber change the future of breast cancer research and care.

Please contact Erin McKenna, Assistant Vice President, Gift Planning, at 800-535-5577 or [Erin\\_McKenna@dfci.harvard.edu](mailto:Erin_McKenna@dfci.harvard.edu), for more information on naming Dana-Farber as a beneficiary in your plans.

## An Update from Erin:



Dear Friends,

Thank you for all that you do to advance groundbreaking cancer research and compassionate patient care at Dana-Farber Cancer Institute.

I am delighted to share our latest issue of Planning Matters

and hope you will enjoy reading about our Dana-Farber Society members and find inspiration in their stories.

As you'll read, naming Dana-Farber and the Jimmy Fund as a full or partial beneficiary of your investment, retirement, or insurance accounts is one example of an easy way to create your own legacy to conquer cancer. A beneficiary designation is arranged separately from your will and no attorney is required to make this contribution—and it costs you nothing today. It simply requires requesting a change of beneficiary form from your plan administrator. This type of gift is also flexible, as designations can be reviewed and adjusted throughout your lifetime and multiple beneficiaries can be named.

With a beneficiary designation, or any type of planned gift to benefit Dana-Farber and the Jimmy Fund, you will be welcomed into the Dana-Farber Society, a special group of forward-thinking individuals who have named Dana-Farber and the Jimmy Fund in their estate plans. If you have already done this and haven't let us know, please get in touch. We would be honored to welcome you before our 27th Annual Dana-Farber Society Recognition Dinner on June 8.

If we can assist you in creating your own lasting legacy, please feel free to contact me at 800-535-5577 or [Erin\\_McKenna@dfci.harvard.edu](mailto:Erin_McKenna@dfci.harvard.edu). You can also visit our website at [Dana-Farber.org/PlanningBrochure](http://Dana-Farber.org/PlanningBrochure) for a free estate planning kit filled with detailed information, tips, and tools on how to get started or update your plan.

Thank you again for your steadfast commitment to our vision of a world without cancer.

Sincerely,

Erin McKenna

Assistant Vice President, Gift Planning

## Use your retirement plan to conquer cancer

Support Dana-Farber and the Jimmy Fund through your Individual Retirement Account (IRA). There are flexible, convenient, and tax-efficient options to give through your IRA.

- **Make a gift directly from your IRA.** If you are 70½ or older, you can make a tax-free gift to Dana-Farber and the Jimmy Fund of up to \$100,000 directly from your rollover or traditional IRA. Contact Erin McKenna, Assistant Vice President, Gift Planning, at 800-535-5577 for a sample letter to send to your IRA administrator.
- **Name Dana-Farber and the Jimmy Fund as a beneficiary of your retirement account.** You can add Dana-Farber as a full or partial beneficiary, or designate a percentage of your account. No attorney is required to make this simple, convenient gift. Dana-Farber's tax ID number is 04-2263040.

### How do I give through my retirement account?



**Go online:** Access your account online and add Dana-Farber as a beneficiary. Our tax ID number is **04-2263040**.



**Contact your Plan Administrator:** Request a beneficiary designation form.



**Call us:** Our team is here to help! Call us at 800-535-5577 with any questions.



Dana-Farber Cancer Institute has been the top ranked cancer hospital in New England by U.S. News and World Report for 16 consecutive years, and is the only cancer center in the country ranked in the top 4 for both adult and pediatric cancer programs.



Dana-Farber Cancer Institute  
10 Brookline Place West, 6th Floor  
Brookline, MA 02445-7226

# DANA-FARBER SOCIETY

## 27th Annual Recognition Dinner

Honoring those who have included Dana-Farber and the Jimmy Fund in their estate plans through their will, trust, beneficiary designation, life income arrangement, or other charitable provision.

Thursday, June 8, 2017

FEATURED PANEL DISCUSSION

## Creating a Legacy through Science & Innovation

If you have left a legacy for Dana-Farber and the Jimmy Fund but have not yet let us know, please contact us so that we can include you in the June 8 celebration.

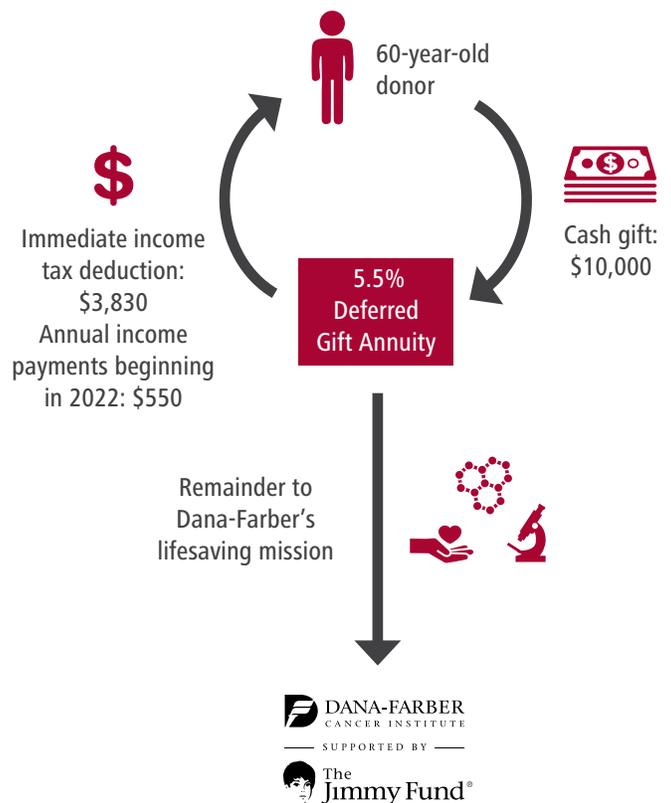
For more information, please contact Kathleen Murphy at 617-632-6326 or Kathleen\_Murphy1@dfci.harvard.edu

## You can earn future income and help fight cancer

A Charitable Gift Annuity (CGA) is a simple agreement between you and Dana-Farber that allows you and/or another beneficiary to receive a fixed lifetime income in exchange for a gift to the Institute. If you are younger than 60 years old or don't need your income payments immediately, you can create a deferred CGA to get an immediate tax deduction and receive payments at a later date—all while supporting Dana-Farber's lifesaving mission.

DEFERRED CGA RATES\* For Single Life Beneficiary

Age	Immediate Annuity Rate	Deferred One Year	Deferred Three Years	Deferred Five Years
70	5.1%	5.5%	6.1%	6.8%
65	4.7%	5.0%	5.4%	6.0%
60	4.4%	4.5%	5.0%	5.5%
55	N/A	N/A	N/A	5.2%



\* Based on a \$10,000 cash gift using the IRS Discount Rate of 2.6% for April 2017

## Patient family shares gratitude to Dana-Farber through estate gift

**T**wo-time cancer survivor Robert “Bob” Doyle and his wife, Anne, credit Dana-Farber Cancer Institute’s expert and compassionate staff with Bob’s recovery from both acute myeloid leukemia (AML) and squamous cell cancer of the tongue. Even though Bob went through grueling treatments for both cancers, he looks on the experience as incredibly positive.

“Each time at Dana-Farber, my entire team was dedicated to my success—not just a cure but my success,” Bob said.

“From the very first appointment at Dana-Farber, my husband was treated with the utmost respect. Their goal was to get the best possible outcomes for our family and they succeeded,” Anne added.

In gratitude for Bob’s care and to ensure future generations will experience the same level of care that their family did, Bob and Anne made a gift to Dana-Farber and the Jimmy Fund in their trust. Their generosity will provide a steady source of future funding for Dana-Farber’s lifesaving mission.

After Bob’s treatment for AML in 2012, which included a bone marrow transplant and a clinical trial, the Doyles returned to their home in Florida. Bob and Anne then decided to make a legacy gift to Dana-Farber, in addition to the annual gifts they make each year.

“Little did I know, I would need Dana-Farber again just two years later,” Bob said.

For a second time, Bob and Anne were impressed with the surgical, radiation, and nursing teams at Dana-Farber. Cancer-free once again, Bob doesn’t hesitate to recommend friends and family to Dana-Farber. The Doyles’ gift is their way of paying things forward and continuing Dana-Farber’s cutting-edge work, which may benefit those close to them in the future.

“You never know what will happen, especially to your loved ones. We want to ensure that our family and friends can obtain the best care possible, so we made this legacy gift. With it, Dana-Farber can continue to research, treat, and work toward cures,” Anne said.

“We love being part of the Dana-Farber community and we felt a responsibility to give back however we could,” Bob added.

With this future gift, Bob and Anne secure the important work of Dana-Farber physicians-scientists for years to come.



Robert “Bob” and Anne Doyle made a gift in their estate plans to Dana-Farber in gratitude for the excellent care Bob received.

*Making a gift to Dana-Farber that helps change lives is as simple as placing the following language in your will:*

“I bequeath (a specific dollar amount/\_\_\_ percentage or the entire residue of my estate) to Dana-Farber Cancer Institute, Inc., 450 Brookline Avenue, Boston, Massachusetts 02215 (for cancer research and patient care, or for a specific purpose important to you). Dana-Farber’s Federal Tax ID: 04-2263040.”

### Fast facts about making a gift in your will or trust

By making a gift to Dana-Farber and the Jimmy Fund in your will, you can:

- Make a profound difference in the lives of cancer patients and their families
- Control assets until your death
- Designate a gift for cancer research and patient care
- Leave a larger gift than might otherwise be possible during your lifetime
- Establish a legacy that will make your family proud
- Enjoy membership in the Dana-Farber Society