

## Patient's legacy gift celebrates "second life" and will fuel research

**L**u Kleppinger, of Vienna, Va., has loved every minute of the past few years. She's been busy volunteering, traveling with her husband, Tony Sabló, and spending time with her beloved toy poodle, Maia. Lu describes this time as the most joyful of her life and she says it is all possible because of Dana-Farber Cancer Institute.

"Dana-Farber has given me a second life," Lu said. "To say that the years post-cancer treatment are the best is inexpressible."

In gratitude and celebration of this "second life," Lu and Tony have included a generous gift to Dana-Farber in their will. Their future gift will propel research and help families grappling with the same rare blood cancer Lu was treated for at Dana-Farber.

After her diagnosis of Waldenström's macroglobulinemia in 2012, Lu was referred by her oncologist in Virginia to Dana-Farber's Bing Center for Waldenström's Macroglobulinemia Research. She underwent 18 months of treatment and is now healthy and grateful to Bing Center director Steven Treon, MD, PhD, and administrative director Christopher Patterson.

"Without Dr. Treon's extraordinary attention and maintenance therapy, I'm not sure I would be here today," Lu said.

"Dr. Treon's treatment was not only life-giving, but he and Chris both also offered tremendous emotional support to Tony and me," she added. "Now I have the good fortune of being in the compassionate care of Dr. Jorge Castillo, which gives me great confidence."

In appreciation for the comprehensive care that has focused on all aspects of Lu's health, Lu and Tony decided to make a legacy gift to Dana-Farber.

"We wanted to make the largest impact possible to move Dana-Farber and Dr. Treon's world-renowned and groundbreaking research forward for Waldenström's patients and caregivers, and we can do this through our estate plans," Lu said. "What greater gift can we give than one that saves lives? For us, it's the ultimate gift."

Lu and Tony found the process of setting up their gift simple and they were able to customize their estate



Lu Kleppinger and her husband, Tony Sabló, made a gift to the Bing Center at Dana-Farber in their estate plans to fund research for Waldenström's macroglobulinemia, which Lu was treated for at Dana-Farber.

plans to support the Bing Center for Waldenström's Macroglobulinemia Research at Dana-Farber and take care of their needs for retirement.

"It's great peace of mind to know our support is going to save lives," Lu said. "We believe research will conquer cancer and we are happy to be giving back on behalf of the world-class care I received."

*Making a gift to Dana-Farber that will 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." Dana-Farber's Federal Tax ID is 04-2263040.*

**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 honoring a family member or caregiver through an estate gift to Dana-Farber.**

## An Update from Erin:



Dear Friends,

Thank you for all the ways you support Dana-Farber Cancer Institute and help make progress in the fight against cancer. This issue of Planning Matters shares the story of

Dana-Farber Society (DFS) members Lu Kleppinger and Tony Sabló. I hope you enjoy their inspiring journey.

I am sure you all remember that in late December, the *Tax Cuts and Jobs Act of 2017* was signed into law and provided for several new lower tax rates, nearly doubled the standard deduction, and removed many personal exemptions and itemized deductions. Although the current income tax charitable deduction was maintained, it significantly reduces the number of taxpayers who itemize and eliminates the benefits of the charitable deduction for many. You may be looking at your own finances and wondering how you and the causes you care about will be impacted. Given this, we have included a few suggestions on tax-efficient giving strategies—one of which is a Charitable Gift Annuity (CGA). This is timely as it was recently announced that CGA rates are on the rise, which you will read more about in this issue.

If you are not already a DFS member, I hope Planning Matters inspires you to consider including a gift to Dana-Farber and the Jimmy Fund in your own estate plans. There are many giving options that can put your assets to work for you and your family, while ultimately benefiting Dana-Farber's lifesaving mission. My team and I are happy to discuss what would work best for you. 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 learn more at [Dana-Farber.org/Legacy](http://Dana-Farber.org/Legacy). Thank you for your continued generosity and partnership.

With gratitude,

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. Please let us know so we can welcome you into the Dana-Farber Society.



Dana-Farber and the Jimmy Fund has received a 4-star rating (highest possible) from Charity Navigator, America's largest charity evaluator, recognizing our prudent financial management and low cost of funds raised.



Dana-Farber Cancer Institute has been the top ranked cancer hospital in New England by U.S. News and World Report for 17 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  
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# 28th Annual Dana-Farber Society Recognition Dinner honors members, marks progress

On May 8, Dana-Farber Society (DFS) members came together at the Mandarin Oriental, Boston to celebrate the advances in cancer research and care at Dana-Farber made possible by their support.

Atul Gawande, MD, MPH, surgeon, researcher, and New York Times best-selling author, was the evening's keynote speaker. He delivered a powerful and timely speech about preserving quality of life and dignity in clinical decision-making, and reinforced how the DFS is impacting the fight against cancer. Gawande shared personal stories, and many interesting statistics on several Dana-Farber-led research studies that are further improving the Institute's exceptional patient care and driving change nationwide. We were thrilled he could join us for this special evening.

The Society continues to grow and the generosity of members secures the future of Dana-Farber's work. There are now more than 1,100 DFS members from almost all 50 states and three countries.



**DANA-FARBER**  
**SOCIETY**



DFS Dinner keynote speaker Atul Gawande, MD, MPH (left), with Institute Trustees and DFS Co-Chairs Barbara and James Sadowsky.



DFS member Win Heard and Institute Trustee and DFS member Marian Heard.



DFS members Fred Reagan (left), and Michael and Arline Longo.



Institute Trustee and DFS member Jean Pearlstein (right), with Institute Trustee and DFS member Harvey Rosenthal and DFS member Andrea Rosenthal.



New DFS members with Dana-Farber President and CEO and DFS member Laurie H. Glimcher, MD (seated, far right), and Institute Trustees and DFS Co-Chairs Barbara and James Sadowsky (back row, fifth from right and far right).

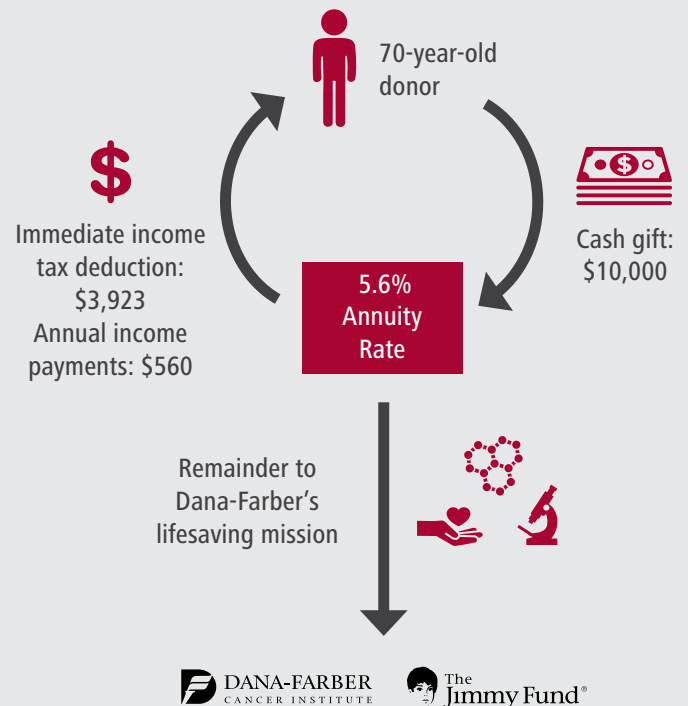
## BREAKING NEWS: New CGA rates provide you with more income!

Establishing a Charitable Gift Annuity (CGA) is a great way to generate income for yourself and/or another beneficiary while supporting Dana-Farber and the Jimmy Fund. **New, higher annuity rates** have been announced by the American Council on Gift Annuities for gifts made on or after **July 1, 2018**. These rates provide you with more income and are the highest they have been since 2010.

### CGA RATES\*

Age	Previous Annuity Rate	Previous Annual Income	NEW RATES	
			New Annuity Rate	New Annual Income
85	7.8%	\$780	<b>8.3%</b>	<b>\$830</b>
80	6.8%	\$680	<b>7.3%</b>	<b>\$730</b>
75	5.8%	\$580	<b>6.2%</b>	<b>\$620</b>
70	5.1%	\$510	<b>5.6%</b>	<b>\$560</b>
65	4.7%	\$470	<b>5.1%</b>	<b>\$510</b>

\* Based on a \$10,000 cash gift made on or after July 1, 2018 for a single life beneficiary using the IRS Discount Rate of 3.2% for May 2018



“There is no way to pay back Dana-Farber for being there in every way—large and small—when I needed them, but becoming a CGA donor is my way of investing in Dana-Farber’s future so they will be there for others in need.”

-**Joan Lancourt**, CGA donor and Dana-Farber patient

## Charitable giving under the new tax law

Tax Reform is here. With this new legislation, the tax benefits of your 2018 charitable giving may be impacted, particularly if you itemize today. There are many ways you can make a gift to Dana-Farber and the Jimmy Fund and continue to have your giving be tax-efficient under this new law. Here are a few suggestions:

- **Gifts of Cash:** Still the most popular way to give—take advantage of the increased cash contribution limit from 50% to 60% of Adjusted Gross Income.
- **Gifts of Stock:** Capital gains tax rates remained unchanged, so you may avoid paying capital gains on gifts of appreciated stock.
- **IRA Rollover Gifts:** For donors 70½ years or older, IRA gifts are beneficial regardless of whether or not you itemize deductions.
- **Life-Income Gifts:** Charitable Gift Annuities (CGAs) and Charitable Remainder Trusts (CRTs) provide a charitable deduction for those that itemize plus a lifetime income stream—a portion of which is tax-free.
- **Batching or Bunching Gifts:** Combine two or three years of gifts into one year to increase your likelihood of going over the standard deduction in that year.