

Dedicated couple supports cancer research with estate



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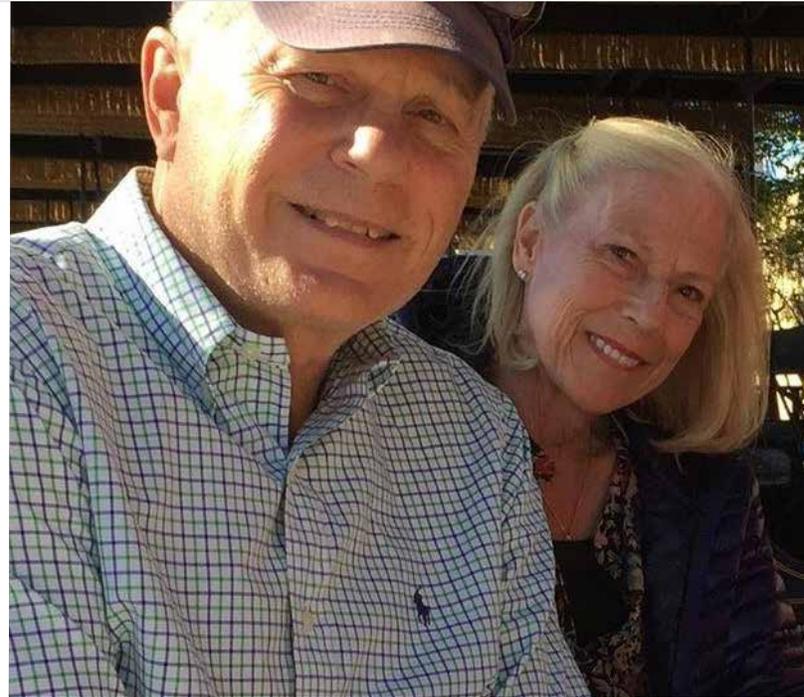
Hank Fitzgerald was a healthy, active grandfather of six, so it came as a shock to him and his family when he was diagnosed with prostate cancer. Being familiar with the Longwood Medical Area – receiving much of his general care there and having four of his grandchildren born in a nearby hospital – Hank felt confident that Dana-Farber was the best place for his treatment.

“The word ‘cancer’ is very scary,” Hank recalled when thinking about his diagnosis. He knew then his life had changed in an instant. With a family to support, Hank was hopeful he could fight his cancer while he continued to work; he turned to Dana-Farber’s Dr. Paul Nguyen for guidance and treatment. Thanks to Dr. Nguyen’s critical research, expertise, and flexibility, Hank was given a minimally impactful option that fit his schedule. For 42 days, he woke up at 5:00 a.m., drove an hour to Boston from his hometown of Sturbridge, MA, received radiation treatment, and then put in a full day of work. Hank’s resilience paid off. Today, six years after his diagnosis, Hank’s prostate-specific antigen levels are so low, they’re barely detectable, and he has a new outlook on life.

“This was a wake-up call for me because I realized just how short life can be, and how important it is to give back to others,” said Hank.

With Hank in remission, he and his wife, Joanne, wanted to show their gratitude to the place that helped save Hank’s life. They decided to name Dana-Farber as a charitable beneficiary in their living trust to support prostate cancer research, leaving a percentage of their estate to fuel progress at the Institute.

“Dana-Farber makes it easy to give. There are so many ways to make a gift while providing for your family at



Hank and his wife, Joanne, made a gift to Dana-Farber through their estate to honor the exceptional care Hank received while being treated for prostate cancer.

the same time, and they have knowledgeable staff to help with real-world scenarios,” said Hank.

Hank and Joanne chose to make a gift through their estate as it allows them to control their assets and retain their financial security while making a larger contribution than they could during their lifetimes and also a greater impact on the lives of fellow cancer patients.

“To whom much is given, much is required,” said Hank. “We wanted to pay it forward. That’s the legacy – helping those that come after you.”

Please contact Erin McKenna, Assistant Vice President, Planned Giving, at 800-535-5577 or 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,

I am pleased to share Planning Matters with you.

This edition features Hank and Joanne Fitzgerald, whose generosity will fuel discovery in prostate cancer research here

at Dana-Farber. The support of Dana-Farber Society (DFS) members continues to advance our progress each and every day and we could not be more grateful to Hank and Joanne and all the others who have provided for Dana-Farber and the Jimmy Fund in their estate plans.

With tax season behind us, we now have a better understanding of how the Tax Cuts and Jobs Act of 2017 impacted our charitable deductions. As individuals dedicated to the cutting-edge work happening at Dana-Farber, we want to provide you with giving options that help Dana-Farber's mission and your financial goals. Inside, we highlight tax-efficient giving strategies such as directing donations from donor advised funds, IRA charitable rollover gifts, and gifts that provide income. We hope this is helpful as you plan your philanthropic support for 2019.

The DFS celebrated its 29th Annual Recognition Dinner at the Mandarin Oriental, Boston in May. We hosted Lawrence S. Bacow, the 29th President of Harvard University, as the evening's keynote. If you have already included Dana-Farber and the Jimmy Fund in your own plans or are considering doing so, please let us know so we can invite you to our 30th Anniversary Recognition Dinner next year!

If you have any questions about ways to make Dana-Farber part of your legacy, please contact me at 800-535-5577 or Erin_McKenna@dfci.harvard.edu. My team and I are here to help you and/or your advisors decide which giving vehicles work best for you and your family. You can also visit Dana-Farber.org/PlanningMatters to learn more.

Thank you for your continued partnership – with your help, we provide hope and better outcomes for our patients and their families.

Sincerely,

Erin McKenna

Assistant Vice President, Planned Giving

Benefits of DFS Membership:

- Knowledge that your support makes a profound difference in the lives of cancer patients and their families
- Confidential, personal planned giving guidance and recommendations
- Updates on research and patient care initiatives at Dana-Farber
- Invitation to the annual Dana-Farber Society Recognition Dinner
- Invitations to exclusive educational and social events
- Recognition in the Dana-Farber Society's annual Honor Roll of Donors



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 18 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 and the Jimmy Fund share patient stories which may include descriptions of actual medical results. Dana-Farber provides personalized care for each patient based on their unique needs; their experiences and results will vary.



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

Members' Legacies Celebrated at 29th Annual Dana-Farber Society Recognition Dinner

Dana-Farber Society (DFS) members gathered at the Mandarin Oriental, Boston on May 14 to hear firsthand how their visionary support is advancing Dana-Farber's lifesaving mission.

Dana-Farber President and CEO, Laurie H. Glimcher, MD, welcomed our new DFS members at a special reception prior to the event. Over dinner, Larry S. Bacow, the 29th President of Harvard University, joined as this year's keynote speaker. He delivered



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a powerful and timely speech and reinforced how the DFS is impacting the fight against cancer. He emphasized that the innovation and discovery happening here in Boston—at Dana-Farber and in collaboration with Harvard—is helping to shape

the future of cancer medicine and bring new treatments to our patients, and to all cancer patients across the globe.

There are now more than 1,200 DFS members from almost all 50 states and four countries. Please consider joining this impressive group of donors. If you have already included a gift in your own estate plans, please let us know. We'd be delighted to welcome you to the Society!



DFS member Gillian Aguilar with her son, Bruce



DFS members Gerald and Eileen Burke



Keynote speaker Larry S. Bacow (second from right) with DFS Co-Chairs and Institute Trustees James and Barbara Sadowsky, Dana-Farber President and CEO Laurie H. Glimcher, MD, and Dana-Farber Chairman of the Board of Trustees, Josh Bekenstein



New DFS member Denise Doyle (right) with her guest, Ceil Andrews, at the New Member Reception, where new DFS members are presented with their official DFS pin



Institute Trustee and DFS Member, Marian Heard and Dana-Farber President Emeritus, David G. Nathan, MD



Institute Trustee and DFS member Alice Cutler (second from left) with Stephen Cutler, (far left) and fellow DFS members Peter Blanshan and Marilyn Wolman

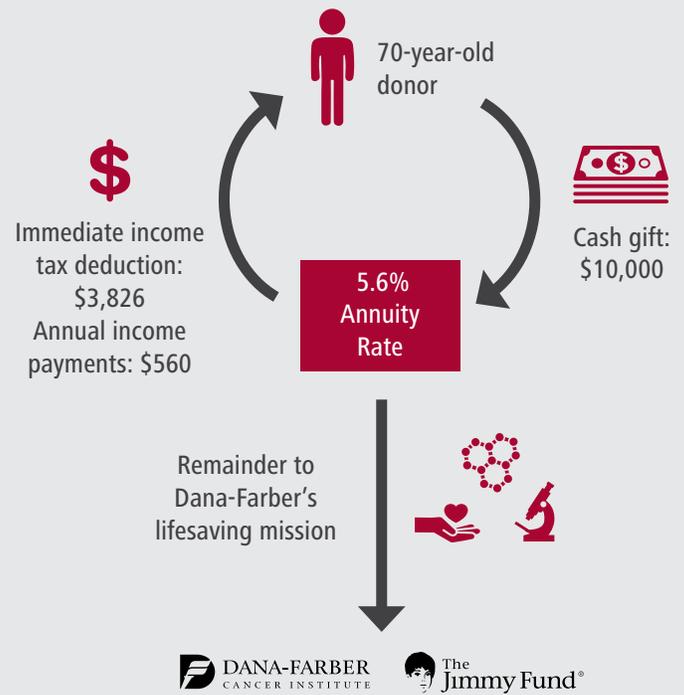
BREAKING NEWS: Increase your income with higher annuity rates!

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

CGA RATES*

Age	NEW RATES		
	New Annuity Rate	New Annual Income	Income Tax Deduction
85	8.3%	\$830	\$5,501
80	7.3%	\$730	\$4,827
75	6.2%	\$620	\$4,432
70	5.6%	\$560	\$3,826
65	5.1%	\$510	\$3,325

* For a single life beneficiary based on a \$10,000 cash gift using the IRS Discount Rate of 3.0% for April 2019



Attention PMC Riders!

Did you know that including the Pan-Mass Challenge in your will, trust, or estate plans qualifies you for Dana-Farber Society membership? If this applies to you, please let Erin McKenna (800-535-5577 or Erin_McKenna@dfci.harvard.edu) know, so you may be recognized in both the DFS and PMC Legacy Society.

Lessons learned: Charitable giving under the new tax law

Tax Reform is here. With this new legislation, the tax benefits of your 2018 charitable giving may have been impacted. As you plan for 2019, you may want to consider one of these tax-efficient giving strategies:

- **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 (AGI).
- **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.
- **Donor Advised Funds:** Give through your donor advised fund to maximize your impact—your fund sponsor handles all record-keeping, disbursements, and tax receipts.