

The Patient Doctor

Stanley P. Bohrer, MD '58, MPH '75, is a physician and 1913 Society member whose career has taken him around the world, introduced him to cultures he embraced, and imbued him with an appreciation for what the Harvard T.H. Chan School of Public Health stands for. Stanley has provided a testamentary endowed fellowship for scholars studying at the Harvard Chan School. Stanley is now professor emeritus at Wake Forest University School of Medicine, and we met with him to find out more about his work and his philanthropy.

The Yoruba word *farabale* personifies his career. It means “be patient,” and Nigerian and expatriate health care workers say, “*farabale, farabale*” to calm excited, worried patients. For Stanley, the word has even greater significance. “I’ll never forget a course I took at the School called Politics and Third World Aid,” he said. “The lecturer told us that all the do-gooders and financial aid really doesn’t put a drop in the bucket in helping developing countries until

Continued on page 2

IN THIS ISSUE

- 2-3 The Patient Doctor
- 3 Letter from Dr. Barry Bloom/ Dr. Tim Johnson
- 4-5 Bequests
- 6 Online Giving with a Donor Advised Fund
- 7 1913 Society Members Roster
- 8 Women Wealth and Longevity Invite

education and a solid infrastructure are established in their societies. I didn't like to hear that. It wasn't until later that I *really* understood the truth of what he said. Along with infrastructure development, it's about the *individuals*—one at a time, patiently attending to sick patients to give them a chance of better health—and training Nigerian medical students and future radiologists. That's what I did when I was there for 14 years and hope those who come after me will continue to do with this legacy gift to the School."

From his Depression-era upbringing, Stanley was a saver, a scholar, and a scientific thinker, fueling his interest in medicine. As a teenager, though, he spent three years as a Capitol page, including working for the powerful U.S. House Speaker Sam Rayburn. "Working as a page taught me that I did not want to go into politics or be a lawyer," he says. "Decisions seemed too arbitrary, where—as in science and medicine you were working with facts! Wisdom in later years has shown me that is not quite true either."

He was originally going to be a surgeon, when one of the most instrumental people in his life entered the picture. "I'll always be indebted to Larry Robbins, who was the head of Radiology at Mass General," says Stanley. "He squeezed me into a residency in radiology. Since I'm more right-brain dominant and have strong visualization abilities, radiology really fit my talents. I ended up passing the Board in diagnostics, radiotherapy, and nuclear radiology." Stanley was elected as a fellow of the American College of Radiology, has written about his Nigerian medical experiences in the *Journal of the American Medical Association* (August 15, 1966, Vol. 197, pp. 228–232), and was a keynote speaker at two Harvard Medical School Alumni weekends. He has written over 100 scientific articles, and a book, *Bone Ischaemia and Infarction in Sickle Cell Disease*.

Working at a resident exchange program in a London hospital set him on a decades-long international quest, thanks to Professor Robert Steiner. "Prof. Steiner was the chair of the Department of Radiology, whose colleague at the University of Ibadan Medical School in Nigeria



Stanley Bohrer's bequest will give scholars the opportunity to help build public health systems one at a time.

Dr. Bohrer's love of African art—as evidenced by the African sculptures and wood carvings filling his home—has influenced his personal artistry. He is a wood carver.



needed help," notes Stanley. "I signed up for a few months and extended that to two years. After returning home for my Board exams, the tug of Nigeria was stronger than staying in the U.S." From working in Ibadan, Nigeria,

to being a visiting professor in Ghana, Kenya, and Tanzania, Stanley witnessed great public health crises, including a local cholera epidemic and the Biafran war, and was arrested by the Nigerian army at one time. He also climbed Mt. Kilimanjaro.

Stanley went on to serve with Project HOPE's programs in Cartagena, Colombia; Quetzaltenango, Guatemala; Jamaica; and the island of Grenada. When he returned to the U.S., he specialized in bone and trauma radiology as a professor of radiology at Wake Forest University School of Medicine. Always the patient explorer, his sabbaticals took him to teach at hospitals in Pakistan, India, and Ecuador.

His love of African art—as evidenced by the African sculptures and wood carvings filling his home—has influenced his personal artistry. He is a wood carver. Using hardwoods of Africa and Latin America as well as mahogany, teak, and rosewood,

Continued on page 3

From the New Chair of the 1913 Society, Professor Barry R. Bloom

Dear Members of the 1913 Society,

When Dean Frenk asked if I would be willing to chair the 1913 Society, I told him I would be delighted to do so. I view it as a priority to recognize this auspicious group of donors and to help others learn how easy it is to support the Harvard Chan School and get something in return. I'm a living example.

Years ago when I was dean, I created a legacy gift called a deferred gift annuity. That means I gave Harvard a sum, they in turn invested it, and a few years later I began receiving a percentage of that initial gift—an annual payout—which continues for the rest of my life. As added benefits, I received a tax deduction on the gift and, most important, it enabled me to create an endowed fund for a critically needed fellowship at our School.

There are many ways to contribute to the Harvard Chan School through planned giving, and it is to my great delight that Dr. Tim Johnson, MPH '76, former chief medical editor for ABC News for 25 years, will serve as vice chair of the 1913 Society. Together we plan to broaden the reach of this group and spread the word that “sophisticated” giving is easy.

If you are a member of the 1913 Society, I thank you for your membership and look forward to your participation at the Society's upcoming events. If you would like to know more about becoming a member through a bequest or other planned gift, send a note to Judi Cantor, director of planned giving, at jtcantor@hsph.harvard.edu.

As I like to say, giving to the School is truly an investment in the future. Please consider it.

Sincerely,



Barry R. Bloom, Ph.D.

Harvard University Distinguished Service Professor and Joan L. and Julius H. Jacobson Professor of Public Health; Departments of Immunology and Infectious Diseases and Global Health and Population; Chair, 1913 Society



Dr. Barry Bloom



Dr. Timothy Johnson

Vice Chair of the 1913 Society Timothy Johnson, M.D., MPH '76

Timothy Johnson is one of the nation's leading medical communicators of health care information. As former Chief Medical Editor for ABC News for 25 years, Johnson provided on-air medical analysis for “Good Morning America,” “World News,” “Nightline” and “20/20.” He graduated *summa cum laude* from Albany Medical College and holds a master's degree in public health from the Harvard T.H. Chan School of Public Health. He has published extensively, received numerous awards, and served on the faculty at Harvard Medical School and the staff of Massachusetts General Hospital. Most recently, Johnson is teaching two “Leading Change” studios for the DrPH program at the Harvard Chan School on April 21 and 27th.

Dr. Bohrer continued from page 2

Stanley has created bowls, plates, masks, abstract designs, busts, classical figures, birds, pipe racks, letter openers, stools, even a Calder-like mobile, and just about anything—including the essential mallets he uses to carve.

“As I gained the wisdom of maturity, I realized that success for me is being content with what I have,” Stanley notes. “These days I don't need more, more, more things—and that is why I can give this bequest so that others will benefit from what this School demonstrates—a true global education in public health.”

A Will to Give

A gift made through your will or trust, typically referred to as a charitable bequest, is a paradox worth considering. The reason: With this gift planning option, you can make a significant charitable gift that strengthens the School's future while retaining control of your assets today. Here is helpful information about why and how gifts through your will or living trust can be effective, valuable tools in meeting personal philanthropic goals.

A Word about Your Will

Your will is a technical and legal document designed by your attorney to distribute your assets. But your will can also reflect your personal values as well as your love and concern for family members, friends, and organizations such as the Harvard T.H. Chan School of Public Health. When you carefully plan your will, it not only ensures the efficient and economical settlement of your estate, it also meets the individual needs of your heirs and expresses your values through specific charitable gifts.

A Word about Revocable Living Trusts

Like a will, a revocable living trust is a tool for managing the disposition of assets. You can change

it or revoke it at any time, but the trust becomes irrevocable at death (or you may also set it up to become irrevocable in the event of incapacity). A revocable living trust provides peace of mind and clarity of intent, and you can name the Harvard Chan School as a beneficiary. Your attorney can tell you more about why you might use a revocable living trust or a will—or both—in your estate planning.

Planning Options with a Gift through Your Will or Trust

There are many different ways to make a charitable bequest. The flexibility of these arrangements is another reason why bequests are an appealing way to realize philanthropic goals.

- A **specific bequest** is a designation to distribute a specific asset or pay a specific amount to a charitable organization.
- A **percentage bequest** allows you to allocate a percentage of your estate to be distributed to a charitable organization. If the value of your estate increases over time, the value of the bequest increases.
- A **residual bequest** designates that a charitable organization receives “what is left” in your estate after all other obligations have been met (costs, debts, taxes, and other bequest designations). This is an appropriate bequest arrangement when you wish other bequests to have priority.

CHECKLIST FOR PLANNING A CHARITABLE BEQUEST TO THE HARVARD T.H. CHAN SCHOOL OF PUBLIC HEALTH

Always use an attorney to draft or amend your will or living trust to include a charitable bequest. We can help you and your attorney with the appropriate language.

- ☐ Review the ownership of your various assets. Pay special attention to life insurance and pension plan beneficiary designations, as well as real estate and other property that is jointly owned with rights of survivorship. Your will or trust must be integrated into an overall estate plan.
- ☐ Review your will or living trust periodically. Circumstances change. So do tax laws, which may influence the assets you select to make your charitable bequest. Remember, your will or living trust only reflects your intentions at the time you wrote it.
- ☐ Please let us know of your bequest intentions. We will help you create “terms” for your gift, which will make certain your goals for supporting the School's work are clearly understood and ultimately accomplished.
- ☐ Make certain your attorney uses our exact legal information of receipt when drafting your charitable bequest: “I give, devise, and bequeath to *The President and Fellows of Harvard College for the Harvard T.H. Chan School of Public Health, Tax ID#04-2103580, 124 Mt. Auburn Street, Cambridge, MA 02138* [name of asset] for the benefit of the Harvard T.H. Chan School of Public Health to be used for the following [description of terms]...”

- A **deferred bequest** designates individual beneficiaries to receive immediate benefits and the Harvard T.H. Chan School of Public Health to receive benefits later. For example, you could designate that money be held in a charitable remainder trust that pays annual income to a designated beneficiary for his or her lifetime, with the remainder of the trust distributed to the School after the death of the beneficiary.

The Gift Decision

A gift through a will or trust is a flexible and helpful planning option for anyone who wishes to provide for loved ones and for favorite charities. If you do not have a will or living trust, meet with your attorney to put one in place. If your will or trust has already been established and you would like to include a gift, talk with your attorney to learn how easy it is to amend your will or living trust.

We are extremely grateful for all legacy gifts. **Please let us know if you have included the Harvard Chan School in your estate planning.** It gives us the opportunity to thank you personally, acknowledge you as a 1913 Society member, and make certain your gift intentions are understood and fulfilled. Of course, we respect and guard your anonymity if you choose not to be acknowledged.

Other Legacy Gift Options

Donor-Advised Funds

A donor-advised fund is a segregated fund maintained by a charitable organization, also known as a sponsoring organization. The sponsoring organization administers the fund, including investment management. Contributions to a donor-advised fund are irrevocable, and the sponsoring organization has legal control over the fund. However, the donor receives an immediate tax deduction for the contribution and has advisory privileges with respect to the distribution or investment of funds in the account.

Donor-advised funds appeal to our friends who are interested in making a tax-deductible gift and having input about how and when the gift is ultimately used. You can also create a legacy gift by naming the School as the **successor** to your account. This “hands on” philanthropy is a personally

satisfying giving option that also provides you freedom from the administrative responsibilities of managing the account. (For more information, see the article on the next page, *Online Giving with a Donor Advised Fund.*)

Retirement Plan Assets

Perhaps you have a traditional IRA or 401(k) plan. If your financial goals include providing for loved ones *and* the Harvard Chan School, there is a good reason to consider naming the School as the beneficiary of one of these tax-deferred accounts while leaving other assets, such as appreciated stock, to family members.

For example, IRA or 401(k) assets left to heirs are subject to income tax on distributions as they occur. But since the Harvard Chan School is a qualified charitable organization, retirement assets left to the School are received in full, with no income tax due, and the full amount of your gift supports the School. Your loved ones who receive appreciated stock you have held more than one year benefit from a stepped-up basis in the stock and pay capital gains tax only when they sell the stock for more than the share price when it was inherited.

Gift of a Retained Life Estate

Under a life estate arrangement, you deed your mortgage-free property (for example, a home, a vacation house, a farm) to the Harvard Chan School, continue to maintain and pay taxes on the property, and retain the right to live in or use the property for the remainder of your lifetime. Upon your death, the property is transferred to the School and the gift is completed. A current income tax charitable deduction is allowed for your gift based on the present value of the School’s remainder interest. Even after you make this gift, you can explore options if you no longer wish to live in or use the property. For example, if you decide later to relocate, you may want to donate your life estate to the School, which would generate another income tax charitable deduction.

Explore the Difference You Can Make

Please contact the School if you would like additional information. It would be a pleasure to assist you in shaping your legacy through a gift in your will or trust, or through other gift planning options. Call Judi Cantor at 617-432-8071 or e-mail jtcantor@hsph.harvard.edu.

Online Giving with a Donor-Advised Fund

An Interview with **Elaine Martyn**, Fidelity Charitable's Vice President of Relationship Management



We met with Elaine Martyn one snowy day in Boston recently to learn more about the remarkably easy way to give a bequest through one's donor-advised fund at Fidelity Charitable, an independent public charity that has helped donors support charities with nearly \$19 billion in grants since its inception in 1991. Elaine double majored in medical studies and English literature and communications at Gannon University, and has a master's in Victorian literature from the University of Leeds. She noted that her large family includes 25 first cousins who are in the medical profession. She understands the mission of the Harvard Chan School and has a passion for health care transformation, having worked at Dana-Farber, Harvard Medical School, King's College London, and Global Fund for Women. At Fidelity Charitable, she champions innovation in philanthropy to help donors make more of a difference in the world. Elaine has a donor-advised fund and often uses the iPhone app to recommend grants.

Q: The Harvard Chan School recently added the Donor-Advised Fund Direct portal to its website. Tell us about this online portal.

EM: We knew the majority of our donors who have donor-advised funds were engaging online—86 percent of our grants are recommended online—and 64 percent of donors visit a charity's website before supporting the charity. So we worked in partnership with 10 charities to create an easy way to make grant recommendations while on a charity's website by clicking on this donor-advised fund portal. It's easier than using a credit card.



Q: What kind of assets do donors use to create a donor-advised fund?

EM: Cash, securities, property through their will, individual retirement accounts, complex assets like shares in C & S-corp businesses, oil and gas interests, and real estate can all be contributed to a donor-advised fund. Especially when giving long-term appreciated publicly traded or non-publicly traded assets to charity, using a donor-advised fund can simplify the process. With this type of fund, you can make one charitable contribution, which produces one tax receipt, but support multiple charities.

For more complex transactions, we have a team of lawyers and other experts in-house dedicated to helping donors make these charitable contributions. It's a complimentary service to help donors maximize their impact when they create their personal, or their family's, donor-advised fund. When donors give certain assets directly to charity, instead of selling them and donating the proceeds, the tax savings can allow donors to give more than 20 percent more in some cases.

Q: Say donors who have a donor-advised fund would like to make an online gift—how does that happen?

EM: To clarify—donors already received the tax deduction when they created and made a contribution into their donor-advised fund. One option, which the Harvard Chan School has adopted, is DAF Direct, which provides a direct link from a charity's website or online campaign to a donor-advised fund. You just click on the application to choose your donor-advised fund sponsor from the menu, enter the amount and designation, and click the "Next" button to finalize the grant recommendation in your donor-advised fund's online account. The name of the charity and the information you entered into DAF Direct is already populated for you, to make the process quick and easy. You can even check a box to schedule a grant recommendation on a regular basis, such as monthly, semi-monthly, or annually.

There are other ways to recommend grants online, too. You can log onto our website or use our iPhone app.

Q: And if donors would like to create a bequest from their donor-advised fund?

EM: That's called setting up a "successor" on the fund. It's very easy, too—you can recommend a person(s) to succeed you in your fund advisory privileges or a nonprofit(s) to which you recommend grants be made, or a combination.

Q: That way, donors can become 1913 Society members if they designate the Harvard T.H. Chan School of Public Health as a successor!

EM: If a donor has a question about how to do this, just call Fidelity Charitable at 800-262-6039.

1913 Society Roster

1913 was an auspicious year. The US Post Office began parcel post deliveries. Picasso had his first US show at the NY Armory. Igor Stravinsky's *Rite of Spring* created a riot in Paris. And in September of that year, the new Harvard-MIT School for Health Officers welcomed its first class of eight. From humble beginnings, the Harvard T.H. Chan School of Public Health is now the world's leading authority on global health issues. We are proud that our legacy society donors have deemed the Harvard Chan School worthy of a bequest or other kind of planned gift, and we list the names of 1913 Society members here. Thank you for making the future of the Harvard Chan School a part of your legacy.

Anonymous (11)

Don Abramowitz, SM '82

Joanne H. Allport, MPH '87

Dorothy Q. Arnold and

David B. Arnold, Jr.

Nelson K. Awew III

Katherine L. Rhyne and

Charles W. Axten

Joan R. Baer and Arthur Bugs Baer

Amy C. Barkin, MPH '76

Judith Benfari and

Robert C. Benfari, SM '67

Terry M. Bennett, MPH '69

Eugene P. Berg, Jr.

Mrs. William McCormick Blair, Jr.

Barry R. Bloom

Stanley P. Bohrer, MD '58, MPH '75

Gary P. Bond, SM '76

Robert D. Brodley

William A. Burgess, SM '51

Annette B. Burke and

Joseph A. Burke, SM '72

Deanna L. Byck, SD '98

Howard E. Chaney, SM '60

Prudence Slitor Crozier, PHD '71

and William M. Crozier, Jr., MBA '63

Joan Selig Damson

and Barrie M. Damson

Mary K. Donaldson

Mike Donatelli

Patricia A. Donovan

and William B. Donovan, SM '70

G. Rita Dudley-Grant, MPH '84

Sumner L. Feldberg

Virginia O. Fine

Katherine A. Forrest, MPH '71

Niki Friedberg and A. Alan Friedberg

Barbara A. Gales, MIH '91

Edward Crocker Green, PDS '02

Jean M. Doherty-Greenberg, MPH '79

and David A. Greenberg, MPH '80

Douglas I. Hammer, MPH '68, DPH '76

Peter O. Haughie, SM '98

Francis Helminski, MPH '85

Maria Helena Henriques-Mueller, SD '84

Jose R. Hernandez-Montoya, MPH '80

Olive W. Holmes

Lilli Schwenk Hornig

Robin C. Herman and Paul F. Horvitz

Howard Hu, MPH '82, SM '86, SD '90

Joan L. Jacobson

and Julius H. Jacobson II

Nancy Johnson and Timothy Johnson, M.D.,
MPH '76

Nancy Elliott and Paul T. Johnston

Marion A. Jordan, SM '77

Apa Juntavee, MPH '95

Stephen B. Kay

Maurice E. Keenan, MPH '77

Geoffrey Kronik

Karim F. Lalji, SM '91

Stanley N. Lapidus

Mary Ann Lavin, SM '74, SD '78

Paul S. Lee, Jr.

Ann M. Lewicki, MPH '76

Chunhua Liu, SM '98, SD '00

Nancy J. Marr, SM '89

Keitaro Matsuo, SM '03

Marjorie J. McLemore

Steven Uranga McKane, MPH '79

Jeffrey W. Mecaskey, SM '90

Diana H. Melvin and S. Noel Melvin

Roger J. Meyer, MPH '59

Joseph M. Miller, AB '42, MD '45, MPH '60

Drs. Katharine E. Morley, MPH '10

and Michael G. Morley, SM '11

Lois H. Moser and

Royce Moser, Jr., MPH '65

Susan A. Elliott and Pat Nicolette

Chong Moo Park, MPH '54

George Putnam

Kakaraparti V. Rao, SM '72

Helen Z. Reinherz, SM '62, SD '65

Rita D. Berkson, SM '77

and Randolph B. Reinhold

Christopher James Ronk, SM '08, SD '10

Phyllis Rose

Louise G. Schloerb and Paul R. Schloerb

Marjorie W. Sharmat

Bernard Shleien, SM '63

Eleanor G. Shore, MPH '70

and Miles F. Shore

Joan Smilow and Joel E. Smilow

Sandi Snegireff and Sergei L. Snegireff

Ruth F. Snider and Eliot I. Snider

Virginia B. Taplin

Isabelle Valadian, MPH '53

Hasi M. Venkatachalam, MPH '68

Marilyn R. Walter

and Ronald A. Walter, SM '72

Jay S. Weisfeld, MPH '77

Thomas G. White, SM '52

Dyann F. Wirth and Peter K. Wirth

Elihu York, MPH '69

Anthony J. Zangara, MPH '62



Membership in the 1913 Society is open to anyone who creates a bequest for the Harvard T.H. Chan School of Public Health, or gives a life-income gift or any other type of planned gift. If you think you should (or should not) be listed here, please let us know by e-mail jtcantor@hsph.harvard.edu or phone **617-432-8071**. When you join the 1913 Society, in addition to this lapel pin and a special Welcome Packet, you will receive invitations to special events for 1913 Society members and news on a quarterly basis.

New 1913 Society members receive a lapel pin and Welcome Packet.

Women, Wealth, and Longevity

WEDNESDAY, APRIL 29, 2015

Harvard Club of New York

12:00 pm-1:30 pm

Sponsored by the 1913 Society



Featured guest speaker

Patricia M. Annino, Esq.

Author of *Women and Money, A Practical Guide to Estate Planning*

“Women in the United States control 75 percent of the total personal wealth, fill more than half the jobs and earn more than half the college degrees. They make up the fastest growing sector of new business owners, the fastest growing sector of the U.S. investor base and, for the first time in history, nearly half of all substantial investors—those with more than 100 thousand dollars of investable assets—are women.

The projected transfer of assets from the World War II generation to baby boomers will likely provide women with even more capital. Women stand to inherit trillions of dollars in the next decade. *Yet, most American women have not yet taken steps to put the legal mechanisms in place through estate planning that will protect their assets, their families, and themselves.*”

—Patricia M. Annino

Patricia Annino, repeatedly chosen by her peers as one of the “Best Lawyers in America” (Trust and Estates), is a nationally recognized authority on estate planning and a partner in the Boston law firm of Prince, Lobel, & Tye, L.L.P., where she chairs the Estate Planning and Estate Administration Group.

Ms. Annino is a Fellow in the American College of Trust and Estates Counsel as well as the author of several professional texts, including *Estate Planning in Massachusetts*, *Women and Money*, and *It's More Than Money*.

Attending this luncheon will help you understand how to take those steps to protect your assets, your loved ones, and yourself. [For more information, or to register by April 24, contact Dana Rogers at 617-432-8442 or RSVP to \[events@hsph.harvard.edu\]\(mailto:events@hsph.harvard.edu\).](#)



Judi Taylor Cantor / Director of Planned Giving
Harvard T.H. Chan School of Public Health / Office for External Relations
90 Smith Street, 4th Floor / Boston, MA 02120-2702
617 432-8071 / 617 407-9390
jtcantor@hsph.harvard.edu



**HARVARD
T.H. CHAN**

SCHOOL OF PUBLIC HEALTH

This newsletter is intended to provide general information, not legal or tax advice about specific situations or problems. Be sure to consult your tax and financial advisors when considering any planned gift.