



Giving Others the Opportunity of a Lifetime

Edward Crocker Green, PDS '02, admits he was a rebellious kid. He learned to ride horses and bicycles while a youngster living in Sweden, read books under the covers after “lights out” in boarding school, and hung out with the most independent-minded (and most badly behaved) kids in his high school class in Seoul, Korea. Since his father was in the foreign service, he was well traveled and lived in several different countries before attending college.

After graduating from George Washington University with a major in anthropology, he realized he wanted to make a difference in people’s health. His love of adventure led him to meet anthropologist Margaret Mead and enter the world of medical anthropology. He completed a master’s at Northwestern, and then went to work in Washington, D.C., soon resuming his anthropology PhD studies at The Catholic University of America. After two

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years of dissertation work in the Amazon forest, Ted received his PhD, and after a few years of university teaching, he had a revelation while consulting on a health assessment in Niger. “In a moment of illumination I saw that anthropology really could relieve suffering and save lives,” he says. “Scholarly papers on the mysteries of matrilineal kinship in Suriname were not the way. Large donor organizations were on the scene, but the more I spoke with experts in their health and nutrition programs, the more I grew convinced that anthropology was a critical missing piece in their strategy. How could foreigners change the behavior of tribal and peasant peoples when they didn’t understand the beliefs, values, attitudes, and indigenous knowledge systems that shaped behavior?” His four-year assignment on a schistosomiasis and cholera project in Swaziland began in 1981 and led to a 35-year full time career in international health. He went on to work on HIV/AIDS, family planning, maternal and child health, integrating African traditional with modern



Ted’s love of folk medicine is equal to his passion for folk music, which he has learned to play by ear.



Ted Green with Takemi Fellows from the 2001-02 program include: BACK ROW: Marc Mitchell (Lecturer on Global Health), Ken Osaka (Japan), Soonman Kwon (South Korea), Masamine Jimba (Japan), Edward Green (USA), Abdelwahed Mekki-Berrada (Morocco), Clifford Odimegwu (Nigeria), Hari Kusnanto (Indonesia). FRONT ROW: Catherine Haskell (Program Coordinator), K. Sujatha Rao (India), Michael R. Reich (Taro Takemi Professor of International Health Policy), Srilatha Sivalenka (India), Nadie Trotman (Program Assistant).

biomedical approaches, clean water and sanitation problems, biodiversity, conservation, and more. His assignments in project design and evaluation and applied research took him to every continent except Australia and Antarctica.

Ted's mentor, Professor Emeritus H. Russell Bernard (recipient of the Franz Boas Award), now at the University of Florida, encouraged Ted to write scholarly articles and academic books during the 22 years he worked outside of universities, and Bernard continues to be a close friend.

It was a colleague, Charles Good, who recommended the Takemi Program in International Health at the (then) Harvard School of Public Health. "I applied to the program and came to Harvard to write what I suppose is my magnum opus, 'Rethinking AIDS Prevention,' which I had a contract to write when I came to Harvard," Ted says. He became a senior research scientist the year after his Takemi fellowship and then served as director of the AIDS Prevention Research Project at the Harvard Center for Population and Development Studies. Michael Reich, former director of that Center and also director of the Takemi Program, has been a valued supporter of Ted's work, which, informed by his anthropology background, is critical of mainstream AIDS prevention. Ted's work suggests that, as shown in Uganda in the latter 1980s, a greater emphasis on discouraging multiple, concurrent sexual partnerships would have more impact on AIDS prevention than promoting condom use or abstinence.

Ted explains his very generous \$2 million bequest to the Harvard Chan School for the Takemi fellows in this way: "I am fortunate to come from an old Massachusetts family that provided my brother and me with a modest trust fund. It was not difficult for me to decide to put some of that into postdoctoral fellowships for scholars from poorer regions of the world to come to Harvard to spend a year working on serious, life-saving problems in international health."

Ted is president of the New Paradigm Fund, a nonprofit he started in 2010, where he continues work in AIDS prevention and other areas of international health.



PHOTO BY MARIA DANIEL BALCAZAR

"When I'm deep in research...and I suddenly come to see relationships or patterns that I hadn't seen before, including those that contradict prevailing orthodoxy...these are liberating moments of excitement, transcendence and sudden recognition..."

THE TAKEMI PROGRAM

The Takemi Program in International Health at the Harvard T.H. Chan School of Public Health is an interdisciplinary research program that focuses on the problems of mobilizing, allocating, and maintaining limited resources to improve health. To address these issues, the program brings together a small group of Takemi Fellows, mid-career professionals from around the world, with particular emphasis on fellows from developing countries. Through its activities, the program aims to advance knowledge about international health and to contribute to institutional development and improvement of national policy. The program was established in 1983 and is named after Dr. Taro Takemi, the distinguished physician-scientist who served for more than 25 years as the president of the Japan Medical Association. Since its inception in 1983, 251 Takemi Fellows from 53 countries have participated in the Program.

For a video on the Takemi Program's 30th Anniversary Symposium in October 2013 and interviews with past Takemi Fellows, see: <http://www.hsph.harvard.edu/takemi/video/>

Our Newest 1913 Society Member

Fong Wang Clow, SM '86, SD '89, came to the School a long way from China's countryside, where she planted and harvested rice by hand in leech-infested fields. She also worked as a barefoot doctor, doing her best to handle the medical needs of her village during the Cultural Revolution. She had learned both Eastern and Western medicine from her mother.

When the universities reopened after 10 years, Fong walked 40 kilometers to take the entrance examination. She won admission, completed her degree, and took a job teaching statistics in a medical school, where she won a World Bank scholarship to study anywhere in the world. Of course, she chose Harvard.

English was her fourth language after Chinese, Russian, and Japanese, so she needed plenty of help. Her beloved thesis advisor, Nan Laird, Harvey V. Fineberg Professor of Public Health, and Professor of Biostatistics, not only was her mentor, she was also Fong's friend and inspiration. Biostatistics faculty members Donna Spiegelman, Jim Ware, and the late Marvin Zelen and Steve Lagakos also were catalysts that made her success possible.

After Fong completed her doctorate, she headed to California, where she lives today with her husband and two children. She worked for Syntex, Genentech, and several other biotech and private-equity companies. She led seven Food and Drug Administration (FDA) approvals for drugs that save tens of thousands of lives and created the only FDA-approved treatment for stroke. She volunteered for the National Institutes of Health for seven years on



Fong Wang Clow, SM '86, SD '89, and Eric Clow live in California with their two children.

two data safety monitoring committees and two grant review committees.

Fong is now the head of biometrics for Pharmacyclics, leading a staff of 60 and providing the statistics for four FDA approvals for Imbruvica, a breakthrough drug for leukemia and other cancers.

She and her husband, Eric Clow, have established the Fong Clow Doctoral Fellowship Fund for the Department of Biostatistics, in honor of Nan Laird. This very generous gift is funded with a charitable remainder trust of \$1 million and will provide an endowment fund for doctoral fellows.

The Department of Biostatistics has also established the Nan Laird Financial Aid Fund in Professor Laird's honor—please contact Court Clayton, Vice Dean of Campaign and Development at cclayton@hsph.harvard.edu or 617 432-8070 for more information.

INAUGURAL 1913 SOCIETY LUNCHEON

For Members and Their Guests

Thursday, June 11, 2015

Noon-2:00 pm

Harvard Faculty Club, 20 Quincy Street, Cambridge, Massachusetts

Featuring Professor Barry Bloom on "The Most Influential Investment"

Moderated by Dr. Timothy Johnson, MPH '76



Dr. Barry Bloom

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.

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|--|---|--|
| Anonymous (11) | Sumner L. Feldberg | Steven Uranga McKane, MPH '79 |
| Don Abramowitz, SM '82 | Virginia O. Fine | Jeffrey W. Mecaskey, SM '90 |
| Joanne H. Allport, MPH '87 | Katherine A. Forrest, MPH '71 | Diana H. Melvin and S. Noel Melvin |
| Dorothy Q. Arnold and
David B. Arnold, Jr. | Niki Friedberg and A. Alan Friedberg | Roger J. Meyer, MPH '59 |
| Nelson K. Aweh III | Barbara A. Gales, MIH '91 | Joseph M. Miller, AB '42, MD '45, MPH '60 |
| Katherine L. Rhyne and
Charles W. Axten | Edward Crocker Green, PDS '02 | Drs. Katharine E. Morley, MPH '10
and Michael G. Morley, SM '11 |
| Joan R. Baer and Arthur Bugs Baer | Jean M. Doherty-Greenberg, MPH '79
and David A. Greenberg, MPH '80 | Lois H. Moser and
Royce Moser, Jr., MPH '65 |
| Amy C. Barkin, MPH '76 | Douglas I. Hammer, MPH '68, DPH '76 | Susan A. Elliott and Pat Nicolette |
| Judith Benfari and
Robert C. Benfari, SM '67 | Peter O. Haughie, SM '98 | Chong Moo Park, MPH '54 |
| Terry M. Bennett, MPH '69 | Francis Helminski, MPH '85 | George Putnam |
| Eugene P. Berg, Jr. | Dr. Charles H. Hennekens, MPH '72,
DPH '75, SM '75 | Kakaraparti V. Rao, SM '72 |
| Mrs. William McCormick Blair, Jr. | Maria Helena Henriques-Mueller, SD '84 | Helen Z. Reinherz, SM '62, SD '65 |
| Barry R. Bloom | Jose R. Hernandez-Montoya, MPH '80 | Rita D. Berkson, SM '77
and Randolph B. Reinhold |
| Stanley P. Bohrer, MD '58, MPH '75 | Olive W. Holmes | Christopher James Ronk, SM '08, SD '10 |
| Gary P. Bond, SM '76 | Lilli Schwenk Hornig | Phyllis Rose |
| Robert D. Brodley | Robin C. Herman and Paul F. Horvitz | Louise G. Schloerb and Paul R. Schloerb |
| William A. Burgess, SM '51 | Howard Hu, MPH '82, SM '86, SD '90 | Marjorie W. Sharmat |
| Annette B. Burke and
Joseph A. Burke, SM '72 | Joan L. Jacobson
and Julius H. Jacobson II | Bernard Shleien, SM '63 |
| Deanna L. Byck, SD '98 | Nancy Johnson and Timothy Johnson, M.D.,
MPH '76 | Eleanor G. Shore, MPH '70
and Miles F. Shore |
| Howard E. Chaney, SM '60 | Nancy Elliott and Paul T. Johnston | Joan Smilow and Joel E. Smilow |
| Mr. Eric Clow and Dr. Fong Wang Clow,
SM '86, SD '89 | Marion A. Jordan, SM '77 | Sandi Snegireff and Sergei L. Snegireff |
| Prudence Slitor Crozier, PhD '71
and William M. Crozier, Jr., MBA '63 | Apa Juntavee, MPH '95 | Ruth F. Snider and Eliot I. Snider |
| Joan P. Curhan | Stephen B. Kay | Virginia B. Taplin |
| Joan Selig Damson
and Barrie M. Damson | Maurice E. Keenan, MPH '77 | Isabelle Valadian, MPH '53 |
| Mary K. Donaldson | Geoffrey Kronik | Hasi M. Venkatachalam, MPH '68 |
| Mike and Evelyn Donatelli | Karim F. Lalji, SM '91 | Michael Voligny |
| Patricia A. Donovan
and William B. Donovan, SM '70 | Stanley N. Lapidus | Marilyn R. Walter
and Ronald A. Walter, SM '72 |
| G. Rita Dudley-Grant, MPH '84 | Mary Ann Lavin, SM '74, SD '78 | Jay S. Weisfeld, MPH '77 |
| | Paul S. Lee, Jr. | Thomas G. White, SM '52 |
| | Ann M. Lewicki, MPH '76 | Dyann F. Wirth and Peter K. Wirth |
| | Chunhua Liu, SM '98, SD '00 | Elihu York, MPH '69 |
| | Nancy J. Marr, SM '89 | Anthony J. Zangara, MPH '62 |
| | Keitaro Matsuo, SM '03 | |
| | Marjorie J. McLemore | |



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.

Lending to Harvard

Most “planned gifts” materialize as assets for the School in the future. Here is a way to give up-front for years and then either receive the principal of the gift back or transfer that wealth to loved ones and reduce taxes. You might call this “lending to Harvard”—or to use the legal term, creating a “charitable lead trust.” Here is how it works:

- You (as the “grantor”) create and fund the trust.
- The trust pays an annual sum (usually 5 percent of principal) for a specified number of years to the Harvard T.H. Chan School of Public Health.
- At the end of the term, the principal of the charitable lead trust goes to you (if you are the “grantor”) or the designated trust beneficiaries.

The Harvard Chan School benefits from the trust “lead” of the noncharitable remainder interest, giving the trust its name. Because you set the term length, the trust can be a flexible part of philanthropic and estate planning. In addition, there can be a reduction in the tax cost of passing property to heirs.



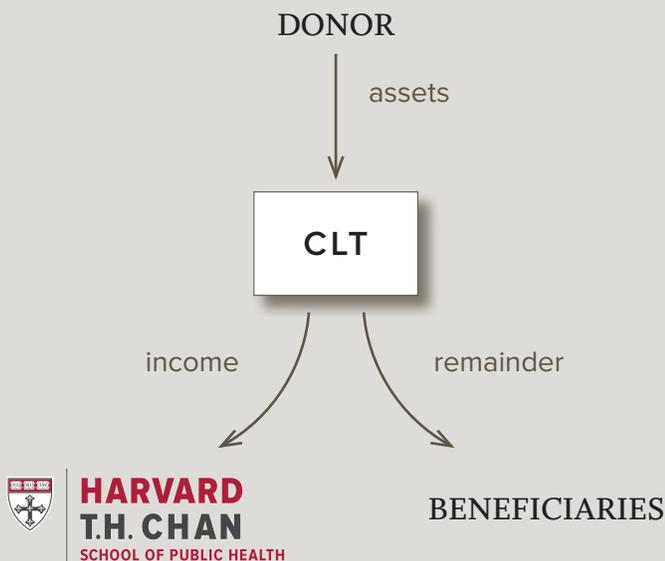
PHOTO BY KENT DAYTON

Evelyn and Mike Donatelli, AB '79, JD '81

“A charitable lead trust is an invaluable way to give the Harvard Chan School needed cash ‘up front.’ You give Harvard at least \$1 million, they invest it and give the School 5 percent of that for a set number of years (usually 10), and then the trust matures back to you, or your children or grandchildren.”

—Mike Donatelli, AB '79, JD '81 and Evelyn Donatelli

HOW THE CHARITABLE LEAD TRUST (CLT) WORKS



Two Popular Types of Charitable Lead Trusts

While a charitable lead trust can be arranged in different ways, here are the two most popular types: the qualified *grantor* and the qualified *nongrantor* charitable lead trusts.

Qualified Grantor Charitable Lead Trust

This trust:

- is established during the grantor's lifetime;
- pays an annual stream of income to a charity for a designated period; and
- returns the principal to the grantor when the period ends.

Because the trust is qualified, the gift tax charitable deduction is available for the present value of the charity's interest in the trust.

If the grantor's reversionary interest exceeds 5 percent, as it usually will, the trust is a grantor trust for federal income-tax purposes. The grantor secures an immediate income tax charitable deduction for the present value of the charity's income interest. The grantor is taxed on the trust income.

The qualified grantor charitable lead trust is especially useful for donors who already intended to make annual gifts to the charity. The trust can accelerate the deductions for these future gifts into one large deduction for the current year (with a carryover of up to five years for any excess deduction if the percentage limitations place a ceiling on the current year's deduction). The donor who has had an extraordinary income year—large realized capital gains, income from the exercise of taxable stock options, receipt of large retirement plan or IRA distributions, or receipt of large commissions or a large performance bonus—may be eager to accelerate future income tax charitable deductions into the current tax year with a qualified grantor charitable lead trust.

Qualified Nongrantor Charitable Lead Trust

This is probably the most commonly used type of charitable lead trust. It can be established during the donor's life or at death under the terms of the donor's will. The trust income is not taxed to the donor and no income tax charitable deduction is available to the donor in the year the trust is established or in any subsequent year. However, the trust itself can take income tax charitable deductions each year as payments are made to the charity. (A charitable lead trust is not income tax exempt, so these deductions will help offset its tax liability.)

The main purpose of the qualified nongrantor charitable lead trust is to reduce transfer taxes on property that ultimately will pass to descendants. This goal is accomplished by naming descendants as the ultimate beneficiaries once all charitable obligations have been satisfied, and utilizing the gift tax and estate tax charitable deductions for the charitable interest to minimize transfer tax costs.

Fictional Example

Beatrice Russo established a charitable lead trust in her will that specified 10 annual payments of \$50,000 (5 percent of its initial principal of \$1 million) to the Harvard Chan School to fund an endowed named fellowship. The trust has a steady annual return of 10 percent. Taxes and expenses consume about one-third of the annual income remaining after each \$50,000 payment to the charity.

When the trust terminates in 10 years (and the School has received a total of \$500,000), Beatrice's two children will receive a distribution in excess of \$1.4 million. This substantially exceeds the value of the children's remainder interest that was taxed at Beatrice's death. The estate tax charitable deduction for the charity's lead interest in the trust effectively sheltered part of the principal that the children eventually receive. Equally important, the trust avoids all transfer taxes on the post-death appreciation of trust assets.*

* *Example for illustrative purposes only.*

A Unique Way to Meet Planning Goals

The charitable lead trust provides unique planning opportunities. You can use such a trust to make an immediate impact on the School's work and provide for family members down the road. Or you can accelerate your support for the Harvard Chan School and benefit from an income tax deduction.

Charitable lead trusts provide other unique planning opportunities as well—particularly in a low interest rate environment. Consult your advisers regarding your personal planning needs, and please let us know how we might be of service. We welcome the opportunity to work with you to achieve your charitable and personal planning goals. For more information, contact Judi Taylor Cantor at jtcantor@hsph.harvard.edu or 617-432-8071.



PHOTO BY KENT DAYTON

Our Website Features Dr. Tim Johnson

Dr. Tim Johnson, distinguished ABC-TV medical correspondent and journalist, recently recorded a video in the Harvard Chan School's Leadership Studio about planned giving. Dr. Johnson, who is also the Vice Chair of the 1913 Society, is a strong advocate of giving a legacy gift to the School, and provides an introduction to our website in his inimitable way. Take a look at [hsph.harvard.edu/planned giving](https://hsph.harvard.edu/planned-giving). Let us know what you think!

Creating a bequest in your will is a meaningful gesture of support for the students, programs, and mission of the Harvard T.H. Chan School of Public Health. There is no minimum amount for a bequest—all gifts are welcomed and appreciated. Here is the most popular kind of bequest, with the appropriate language so that we can faithfully follow your wishes.

FOR AN OUTRIGHT (SIMPLE) BEQUEST: "I irrevocably 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 St., Cambridge, MA 02138 the sum of \$ [or a description of a specific asset], for the benefit of the Harvard T.H. Chan School of Public Health to be used for the following purpose: [state the purpose]. If at any time in the judgment of the trustees of the Harvard T.H. Chan School of Public Health it is impossible or impracticable to carry out exactly the designated purpose, they shall determine an alternative purpose closest to the designated purpose."



Professor Barry R. Bloom
Harvard University Distinguished Service Professor and Joan L. and Julius H. Jacobson Professor of Public Health
Chair, 1913 Society

Dr. Timothy Johnson, MPH '76
Vice Chair, 1913 Society

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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.