

# HEALTHY INVESTMENTS

FOR ALUMNI AND FRIENDS OF A.T. STILL UNIVERSITY

FALL 2023

## RISING THROUGH THE RANKS, DOCTOR MAKES GIFT TO HONOR ROOTS OF LEARNING



Dr. Richard and  
Suzanne Jeffries

Throughout a remarkable medical journey, Richard Jeffries, DO, '68, has woven a legacy of consistent giving that continues to fortify the future of medical education at A.T. Still University (ATSU).

His journey began as a first-year medical student in the nation's heartland. "I was not entirely sure what to expect," Dr. Jeffries says. Humble and unassuming when compared to his friends' educational surroundings back East, the Kirksville College of Osteopathic Medicine (KCOM) delivered a transformational experience that shaped Dr. Jeffries' life.

The challenges were abundant but the completion of his degree and subsequent residency in internal medicine revealed the

magnitude of the education he received at ATSU-KCOM.

Armed with the knowledge and experience he had acquired, Dr. Jeffries joined one of his residency mentors to form a two-person internal medicine practice. Their dedication and expertise soon led to a bustling practice that gained recognition from a national consultant for its volume and efficiency.

One of the areas he remains proud of was his ability to interpret EKGs, which he attributes to the robust foundation he received during his osteopathic training.

"After our hospital merged with two large allopathic hospitals with at least 50 cardiologists on board, they objected to general internists doing these interpretations. A study of the interpretations was done, and it showed our analyses were more accurate than any of the cardiology groups, so we continued on," Dr. Jeffries says.

Ascending the ranks, Dr. Jeffries became chairman of the Department of Medicine at the local hospital and later chairman of the entire

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Pinnacle UPMC Hospitals in central Pennsylvania. Amid his achievements, he never forgot his roots.

To show his gratitude, he established the Richard H. Jeffries, DO, General Operations Endowment to benefit the university that had profoundly impacted his life. “I wanted to provide an ongoing funding source for the benefit of the medical school.”

Dr. Jeffries and his wife, Suzanne, continue to contribute to this endowment with gifts from their donor advised fund. Donor advised funds are a versatile and impactful charitable giving tool, known for their flexibility, tax advantages, and ability to support a range of causes. Gifts from donor advised funds are welcomed at ATSU.

“I encourage others who have benefited from the education they received at Kirksville to give back to help those who follow us to receive the same grounding we did in becoming physicians,” Dr. Jeffries says.

# THE POWER OF YOUR DONOR ADVISED FUND

From simple record-keeping to tax-saving contributions, there are many reasons to open a donor advised fund (DAF). There are also a few ways to further optimize this charitable savings account to do the most good.

### **Have you used your DAF to the fullest? Here are some ideas:**

- Itemize your taxes to realize an income tax charitable deduction from DAF contributions.
- Transfer complex assets, such as real estate or business interests, into your DAF account without incurring capital gains taxes.
- Designate your DAF as the beneficiary of your IRA or charitable remainder trust.

Additionally, you can designate the balance of a DAF to A.T. Still University after your lifetime. You can choose to have any remaining DAF funds distributed to ATSU after you pass by naming the University as a beneficiary of all or a portion of the remaining funds. If you choose to do so, please use the legal name, A.T. Still University, and contact us for our tax identification number.

### **Haven't opened a DAF yet? Here's why you should.**

- **Convenience and timing** — You may take a tax deduction now, when you make a gift to the fund, without immediately having to choose the charities you want to recommend for support.
- **Simplicity** — You can support several charitable organizations without having to retain records for a number of separate contributions.
- **Family philanthropy** — Families can build a tradition of giving and teach their children the values of philanthropy by involving them in the decisions about which grants to recommend.

### **Learn more**

Contact Brad Chambers at 660.626.2494 or [bradchambers@atsu.edu](mailto:bradchambers@atsu.edu) to discover how a donor advised fund can extend your impact at ATSU.



## MAKING YOUR GIFT

### Four easy steps to include us in your will or trust

Remembering A.T. Still University in your will or trust is one of the most enduring statements you can make about your belief in our mission. The support you have offered during your lifetime can endure for years to come.

Your gift can be a specific asset, such as a certain amount of cash, securities, or property, or a percentage of your estate. Plus, a gift in your will is flexible — it can be updated or revoked at any time — and it can be accomplished in as few as four steps:

1. Determine whether you'd like to make a gift of a specific amount or if you'd like to leave a percentage.
2. Decide if you want to direct your gift to help particular projects or leave your gift unrestricted, allowing it to be used for our areas of greatest need.
3. Contact Brad Chambers to receive sample language needed to complete your gift.
4. Share the sample language with your attorney so your gift can be put in place.



If you have questions during the process of including a gift in your will or trust, contact Brad Chambers at [bradchambers@atsu.edu](mailto:bradchambers@atsu.edu) or 660.626.2494.



### Make the most of your giving

Did you know that you can use your donor advised fund to build a lasting legacy at ATSU? Learn about simple options to ensure future support in our new guide, ***Maximize the Impact of Donor Advised Funds***. Return the enclosed reply card today to receive your copy.

# SMART WAYS TO GIVE BEFORE 2023 ENDS

Would you like to finish this year with a gift that maximizes your impact on ATSU and reduces your taxes? Consider these smart options below.

## Make an immediate difference

When you support A.T. Still University by simply writing a check, you make great things happen and qualify for an income tax deduction.

**Did you know?** Your envelope must be postmarked on or before Dec. 31 for your donation to qualify this year.

## Use appreciated securities

By donating appreciated securities that you have owned for longer than one year, you qualify for an income tax deduction and eliminate any tax on the appreciation.

**Did you know?** If the securities are electronically transferred, the gift date is the day the securities enter our account — *not* the date you ask your broker to make the transfer.

## Contribute to your donor advised fund

Add funds to an existing DAF or open a new one at a community foundation or sponsoring organization.

**Did you know?** You qualify for a tax deduction when you make a gift to your DAF. If you are ready to start making an impact with your DAF, consider recommending a grant (or recurring grants) to support ATSU.

## Make a gift from your IRA

If you are 70½ or older, you can give any amount up to \$100,000 from your IRA directly to ATSU. You will not pay income taxes on the transfer. If you are required to take minimum distributions, your gift can satisfy all or part of your obligation.

**Did you know?** If you have check-writing features on your IRA, your check must clear your account by Dec. 31.



## THE COUNTDOWN IS ON

We are always happy to help ensure that you realize the greatest benefit for your kindness. Contact Brad Chambers today.

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