

Healthy Investments

For alumni and friends of A.T. Still University

SUMMER 2019

WHAT TO EXPECT: A VISIT FROM UNIVERSITY ADVANCEMENT

Alumni are sometimes reluctant to accept a visit from their alma mater's advancement officer. Usually, the hesitation comes from a financial perspective: they think the primary purpose of the visit is to secure a donation to the University. While fundraising is an important component, the real purpose is to build a relationship.

For example, Leonard DiGiovanni, DO, FACOFP, '63, is a loyal alumnus of ATSU-KCOM and a strong supporter of osteopathic medicine.

"I am forever beholden for the incredible training I had at ATSU-KCOM," Dr. DiGiovanni says. "I would not be where I am today, and my family would not be where they are today, without Kirksville."

Through multiple donations, Dr. DiGiovanni had reached his personal giving goal. When contacted for a visit by University Advancement recently, he anticipated being asked for an additional donation. The visit was not what he expected.

"During my visit, we went out for lunch, and I wasn't approached for any money," he says. "I



University Advancement's Karen DeCarlo, director of development, meets with Dr. Donald Robertson during her visit to Oregon.

was thanked for my past work, and we had a nice conversation."

Brad Chambers, director of development, says a typical visit focuses on learning the graduate's story. An officer usually meets with alumni at their home, office, or a local restaurant and

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asks about experiences in school, individuals who shaped them, and what inspired them to pursue a degree at ATSU.

“We hope to learn more about their professional achievements and demonstrate our gratitude for the ways they have served and supported the University and their profession,” Chambers says. “Their personal stories become a part of the University’s narrative and identity.”

In addition to thanking alumni for their past giving and service, the conversation includes opportunities to serve as an alumni mentor or serve on an alumni board. The advancement officer updates alumni on changes at the University and is responsive to any concerns or aspirations they have regarding ATSU.

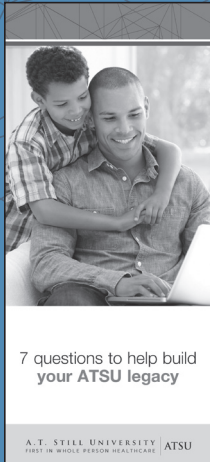
In some cases, alumni have shared their intentions to include ATSU in their estate plans. By building a relationship and having open discussions, University Advancement is able to support alumni and ensure their wishes are fulfilled.

Donald Robertson, DO, ’75, has always welcomed visits from advancement officers. Much like Dr. DiGiovanni, Dr. Robertson feels he owes his professional career to ATSU-KCOM. With many of his family members also being alumni, his visits resulted in setting up a family endowment.

“Meeting with an advancement officer is painless and actually fun,” Dr. Robertson says. “No one is going to bite you if you don’t give.”

Ultimately, advancement officers want to learn about the values and priorities of alumni. Through conversations, they seek to find ways alumni and friends can collaborate with ATSU to accomplish mutually beneficial goals.

“Alumni and friends of the University are among our most valuable assets,” says Chambers. “We want to not only preserve but also enhance those relationships in ways that elevate our alumni, our students, and our University.”



SHARE YOUR STORY

We all have a set of values and beliefs that guide our lives. Make sure your loved ones are aware of those principles, including your philanthropic intentions, by creating a legacy letter. Our complimentary guide *7 questions to help build your ATSU legacy* can help you get started. Request your copy using the enclosed reply card.



Your connection to ATSU makes the University the extraordinary place it is today. Why not deepen that connection and share your personal story? Use the back of the enclosed reply card to tell us how ATSU has made an impact in your life. We can’t wait to hear from you.



ENDOWMENTS: THE GIFTS THAT KEEP ON GIVING

An endowment is a forever gift, a way to ensure your support for the places and organizations you care about most, like A.T. Still University, lives on forever. When you establish an endowment, or contribute to an existing one, you create a lasting legacy that reflects your values.

How an endowment works

When you make an endowed gift to ATSU, only a small portion of your gift will be spent each year. The balance is invested, allowing the gift to live on in perpetuity.

Funding your endowment

There are many ways to fund your endowment without using cash. Some allow you to establish your gift now, while others won't go into effect until after your lifetime.

- **Appreciated assets.** Using appreciated assets that you have owned for more than one year may

allow you to eliminate capital gains tax on the asset's appreciation.

- **Life insurance.** Name A.T. Still University the beneficiary of your life insurance policy, or make us the owner of a policy you no longer need.
- **Retirement plan assets.** Consider naming ATSU the beneficiary of your retirement plan assets. After your lifetime, the funds will go to establishing your endowment.
- **A gift in your will or living trust.** Your gift to ATSU can be a specific amount or a percentage of your residuary estate.

Ensure ATSU's pioneering healthcare education continues for generations to come. Contact Brad Chambers at bradchambers@atsu.edu or 660.626.2494 for assistance making your gift.



A heartfelt gift

Creating a named endowment for your loved one or a beloved professor is the perfect way to honor them far into the future.



Protect your family and provide for future students by remembering ATSU in your estate plan. Contact us or return the enclosed reply card to request sample language to include a gift to ATSU in your will or trust and share it with your attorney.

PLAN TO MAKE A DIFFERENCE

Philanthropic solutions for the sandwich generation

Caring for others can put a strain on your time and your finances, especially if you're caring for both children and aging parents. And if you're helping older children with tuition and living expenses, it can be even more challenging to achieve your philanthropic goals — at least right now.

A gift to ATSU may not be part of your plan today, but you can still advance healthcare education tomorrow. In fact, some of the most meaningful gifts we receive are those that people leave to ATSU after their lifetimes, such as a gift in their wills or living trusts.

A family-friendly gift

A gift in your will to A.T. Still

University is easy to make; it only requires one written sentence. Because the gift doesn't occur until after your lifetime, it doesn't affect your current budget. You can also change your mind at any time, which makes it easy to ensure your gift always aligns with your life circumstances.

By remembering ATSU in your will or trust, you ensure that your family members have the resources they need now, and you provide ATSU with the ability to plan for the future with confidence. And you gain the satisfaction of knowing you've realized your philanthropic goals.

A.T. STILL UNIVERSITY | ATSU

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