Healthy Investments is prepared exclusively for the information of our alumni and friends. Its purpose is to point out current developments that may be helpful in your tax and financial planning. Through wise planning you may be in a better position to assist us with our work in these times of great financial need. You should, of course, consult your own attorney as to the applicability of any item to your own situation.

HEALTHY

ATSU A.T. Still University

FOR ALUMNI AND FRIENDS OF A.T. STILL UNIVERSITY

SUPPORTING HIS ATSU-KCOM FAMILY AND HONORING THE SERVICE OF ANOTHER

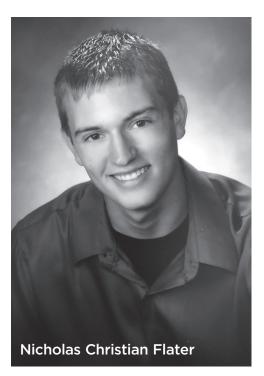
There is the family we are born into and the family we choose.

The severe storm that descended on central lowa in August 1947 swept away the bridge to the Stanley family farm, isolating Alta Stanley as her contractions, and the storm, intensified. Her husband, Richard, had left earlier that evening to summon the family doctor, George Davison, DO, '45. Confronted with the choice of risking his life or that of Alta and her unborn child, Dr. Davison battled the waters of the swollen creek, successfully reaching the farmhouse on foot and delivering the Stanley's newborn son, William.

As William matured, he set his sights on medical school, becoming the first in his family to complete a college degree. With an influential recommendation from Dr. Davison, he joined the A.T. Still University-Kirksville College of Osteopathic Medicine (ATSU-KCOM) family in 1969 as a first-year student. It was the realization of a dream.

Following graduation, the personal and professional family of William "Bill" Stanley, DO, '73, grew as he built a successful surgical practice. Kris and Jerry Flater and their children, Nicholas and Kate, became beloved members of Dr. Stanley's chosen extended and expanding family, with Kris serving his practice for more than a decade.

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ATSU/ATSU

FALL 2021

"A son any parent would be proud of." –William "Bill" Stanley, DO, '73

Supporting his ATSU-KCOM family and honoring the service of another

Continued from Page 1

"Kris and Jerry have been medical professionals all their lives," says Dr. Stanley. "Kris was a loyal manager of my surgical practice, member of our heart team, and excellent nurse at our hospital."

Tragically, the Flater family was dealt a devastating blow in 2017 with the accidental death of 30-year-old Nicholas.

"Nicholas was a superb young man with a bright future. A son that any parent would be proud of," Dr. Stanley says.

Nicholas served his country as a Marine, with a tour in Iraq. He later became an EMT affiliated with the emergency room at Des Moines' Mercy Hospital. At the time of his death, Nicholas was an apprentice at The Waldinger Corporation and a member of Plumbers and Steamfitters Local Union 33.

"He is one of our country's heroes," Dr. Stanley says. His parents, Kris and Jerry, add: "Nick was curious, fearless, courageous, brave, and wonderfully tenderhearted."

Dr. Stanley is now honoring Nicholas' memory with an incredible gift. He created the Nicholas Christian Flater Memorial Scholarship in 2021 through a generous contribution to ATSU-KCOM. Dr. Stanley made the gift through a qualified charitable distribution (commonly known as an IRA charitable rollover).

A qualified charitable distribution allows individuals age 70¹/₂ and older to make a gift of any amount up to \$100,000 per year

directly from their IRA to a qualified charity. The transfer does not count toward their taxable income in the year the charitable gift is complete. Beginning in the year you turn 72, you can use your gift to satisfy all or part of your required minimum distribution. The gift can lower your adjusted gross income and taxable income, resulting in a lower overall tax liability for the year.

This new scholarship fund recognizes Nicholas Flater and his heroism in perpetuity while providing scholarship support to another branch of Dr. Stanley's extended family: ATSU-KCOM and its osteopathic medical students.

"ATSU-KCOM opened the door of opportunity, which has lasted a lifetime. For that I am eternally grateful," says Dr. Stanley. "Any success I have achieved started at ATSU-KCOM."

Family, heroism, and generosity. These are the recurring themes of Dr. Stanley's story. A story that is only beginning to be told through the legacy he has created and one that will continue to impact future generations at ATSU-KCOM.

Please visit giving.atsu.edu/flater to make an online gift to the Nicholas Christian Flater Memorial Scholarship.

Like Dr. Stanley, you can make a difference and help ATSU in the future. Please contact Brad Chambers at 660.626.2494 or bradchambers@atsu.edu to learn more.

ATSU A.T. Still Universit

Discover a tax-wise way to give

Want to make a difference today at our organization and save on taxes using your IRA if you are age 70¹/₂ or older? Our new brochure *A Tax-Smart Way to Give Through Your IRA* shows you how. Use the enclosed reply card today to receive your FREE copy.



A Tax-Smart Way to Give Through Your IRA



YOUR LIFE'S WORK

Why do you give? Do you want to make a real difference? Is your generosity a reflection of your values, or a way to inspire others to give? Whatever the reason you support A.T. Still University, it's clear you believe in what we do.

Because of your connection to ATSU, it's natural that you would like our mission to continue well into the future. How? By making a future gift as part of your legacy.

Create your legacy at ATSU

You can continue your generosity long after your lifetime. Some options include:

Percentage giving. Through your will, you can designate percentages of your estate as you see fit. For example, designate 5% of your total estate to ATSU, while leaving 95% to loved ones.

- **Blended giving.** Give an outright gift of cash or other assets today, combined with a future gift, such as naming ATSU in your will.
- Beneficiary designation. A simple form is all it takes to name us as a beneficiary of your retirement plan assets, unneeded life insurance policy, or donor advised fund.

Your life's work (and subsequent legacy) is your opportunity to make a statement. Whatever the reason behind your giving, we are here to help you fulfill your goals. Contact Brad Chambers at 660.626.2494 or bradchambers@atsu.edu with any questions.

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We're here to help Let us partner with you in your planning process. Contact Brad Chambers at 660.626.2494 or bradchambers@atsu.edu with any questions. We are happy to help.

BACK TO BASICS 4 ESSENTIAL ESTATE PLANNING DOCUMENTS

You don't have to be an expert to create a successful estate plan. All you need are four essential documents. Our team has helped supporters like you use their estate plans to further our work to educate and train students to become osteopathic physicians and healthcare leaders. We'd be honored to help you, too.

- Last will and testament and/or trust—Controls how your assets, such as money and property, are distributed after your lifetime. Without a will, the state you live in decides what happens to your assets. Trusts allow you to make special arrangements for the management of your assets for yourself and others, such as sheltering assets for a surviving spouse or benefiting heirs or your favorite nonprofits.
- 2. Durable power of attorney for finances—Names a person who will have the legal right to handle financial matters on your behalf if you are unable to do so.
- 3. Durable power of attorney for healthcare—Also known as a healthcare proxy, this document addresses all medical treatment. It names one or more individuals you trust to make medical decisions on your behalf if you are incapacitated.
- 4. Living will/advance directive—Documents your wishes regarding life-sustaining care.

ATSU A.T. Still University

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