Emory University School of Medicine trains the next generation of compassionate clinicians and medical leaders by providing outstanding programs in research, education, and clinical care. Our innovative, collaborative research—both in the clinic and the laboratory—leads to discoveries and treatments that advance the quality of patient care worldwide.

Philanthropic support is central to the School of Medicine’s growth and to Emory’s role as a national leader in medicine. Friends, alumni, and patients can ensure that Emory remains at the forefront by becoming partners in our vision for a healthier future.

I hope you will join us in building that future by supporting the work of our faculty, staff, and rising medical talent. By including Emory School of Medicine in your estate plans, you can create your own legacy and help us push the boundaries of health care and medical education.

Sincerely,

Vikas P. Sukhatme, MD, ScD
Dean, Emory University School of Medicine
Chief Academic Officer, Emory Healthcare

JOIN US IN BUILDING A HEALTHIER FUTURE

You can support the school in many ways, from naming Emory School of Medicine a beneficiary of a qualified retirement plan to making a bequest from your estate.

Emory’s Office of Gift Planning will work with you and your advisers to create a plan that meets your financial and philanthropic goals.

GIVING A GIFT IS EASY
“After my husband, Alan, lost his battle with lymphoma, I wanted to help find a cure. As a lifelong educator, I believe that private research universities promote the insatiable desire for knowledge that leads to breakthroughs. At Emory School of Medicine, with its focus on education, research, and patient care, I found the right way to honor Alan through my estate—by creating a scholarship for deserving medical students.”

Sandra Kirschenmann
Marietta, Georgia

Emory School of Medicine is a leading institution with the highest standards in education, research, and patient care. We are committed to recruiting and developing a diverse group of students and innovative leaders in biomedical science, public health, medical education, and clinical care. We foster a culture that integrates leading-edge basic, translational, and clinical research to further the ability to deliver quality health care, predict illness, and promote the health of our patients and communities.

The medical students and physicians we train provide the highest quality of compassionate care for their communities and conduct research that integrates new discoveries into the practice of medicine.
“As a patient of the Emory Eye Center, I know firsthand that Emory delivers the best care. That’s why I’m including a planned gift for glaucoma research in my estate plans, as well as a bequest advancing Alzheimer’s research and a gift to Winship Cancer Institute to defeat cancer. Emory’s researchers are fighting for better treatments, better quality of life, and—above all—cures.”

Jim Lewis
Douglasville, Georgia
**EDUCATION**
Scholarships ease the financial burden for many medical students, which allows our future physicians to focus on their studies. Funding for programs and lectureships enables our students to gain the most from their education through more dynamic learning opportunities.

**RESEARCH**
As a leading academic medical center at an internationally renowned research university, Emory School of Medicine remains at the forefront of innovation. By collaborating with each other, as well as with scholars in basic sciences and other disciplines, Emory faculty members make advances that translate to life-saving patient care.

**PATIENT CARE**
Emory School of Medicine doctors, faculty members, and trainees provide high-quality, compassionate care throughout the Emory Healthcare system. Our team members help find solutions to complex problems and are empowered to influence change for, and with, our patients, their families, the community, and each other.

**UNRESTRICTED**
By making an unrestricted estate gift, you provide funding that allows Emory School of Medicine to address its greatest priorities at the time your legacy gift is received. Unrestricted funding helps Emory meet unforeseen needs and invest in new opportunities, fueling further growth and enabling innovation.

**INVEST IN WHAT MATTERS TO YOU**
What sets Emory Healthcare apart is our high-quality care that centers around our patients and their families. Emory University School of Medicine is central to our work. The school’s talented faculty members, residents, fellows, and alumni provide care in our hospitals and clinics, and they are driving research that improves the quality of people’s lives both here at home and around the world.

I invite you to make a planned gift to establish your own legacy of healing. A planned gift is a powerful way to help Emory create a healthier future. Support Emory School of Medicine and leave a legacy of care today.

Thank you,

Jonathan S. Lewin, MD
President, CEO, and Chairman of the Board, Emory Healthcare
Executive Vice President for Health Affairs, Emory University
Executive Director, Woodruff Health Sciences Center
“As an oncologist, I have a lot of opportunities to talk about legacy planning and goals of care with patients. The fun part is encouraging them to leave a legacy, and it’s surprising how many people don’t think of it, even though the paperwork is not hard. I give to Emory because it is where I learned to be a creative problem solver and compassionate physician who is comfortable treating underserved populations.”

Michelle Ludwig 05M 05MPH
Associate Professor of Radiation Oncology and Medical Student Clerkship Director,
Baylor College of Medicine
Houston, Texas
KNOW YOUR OPTIONS

BEQUESTS: GIFTS IN YOUR WILL
1. One of the simplest and most popular ways to make a gift, a charitable bequest allows you to name Emory School of Medicine as a beneficiary of your estate, either in your will or through a living trust. When you make a bequest to Emory School of Medicine, you continue to control your assets during your lifetime so your current needs are met. A well-designed bequest may result in lower estate taxes, allowing you to leave more for loved ones.

2. Naming Emory School of Medicine as a beneficiary of your IRA or other qualified retirement plan is a simple and tax-effective gift. The assets held in your retirement plan may be subject to both estate and income taxes, reducing the value received by your heirs. Because of Emory’s tax-exempt status, these gifts avoid both potential taxes.

3. With a charitable remainder trust, you or other named individuals can receive annual income from assets you place in the trust you create. Payments can be variable or a fixed amount. After the life of the named individuals or a set period of years, the balance in the trust goes to Emory School of Medicine.

4. Charitable gift annuities are simple contracts between you and Emory University that provide you and a second individual, if you choose, income for the rest of your life and future support to the School of Medicine. A gift annuity can be established with a minimum of $10,000.

5. Assets with appreciated value that have been held for more than a year, such as stocks or real estate, are excellent sources of outright giving. You can deduct the fair market value of the donated asset and pay no capital gains tax on the increased value.

6. An IRA charitable rollover is a simple and tax-effective way to support Emory. If you are 70 1/2 or older, you can give up to $100,000 each year directly from your IRA to Emory.

RETRIEVAL PLANS

OUTRIGHT GIFT OF APPRECIATED PROPERTY
**Gift Plans at a Glance**

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<th>Bequest</th>
<th>Retirement Plan Assets</th>
<th>Charitable Remainder Trust</th>
<th>Charitable Gift Annuity</th>
<th>Outright Gift of Appreciated Property</th>
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**Join Us!**

We invite you to become a member of the 1836 Society—named for the year of Emory’s establishment—by making a planned gift from your estate. The 1836 Society honors the legacy of those whose dedication and wise planning strengthen Emory for years to come.
“Emory is making a difference in important medical research. This is where good work is being done. Through my planned gift, I want to help make even more of that good work happen. I’m not a scientist, but I know what the results of research can do for humankind.”

Mike Dangerfield
Atlanta, Georgia
Emory’s Office of Gift Planning professionals work with donors and their legal and financial advisers to create the most advantageous legacy gifts for our donors, their families, and for Emory. By evaluating philanthropic goals, available assets, and tax implications, we assist you in planning your ultimate gift. We are happy to create personalized examples to best explore your gift planning needs.

“\nI completed my residency in pediatric medicine at Emory nearly 60 years ago. My eldest son earned his medical degree and training from Emory, and now my grandson, Daniel, is studying medicine at Emory as well. I owe so much to Emory, which is why I’m giving back to the School of Medicine through a charitable gift annuity. I want to help Emory continue to educate future generations of doctors.”

Elma Steves 59MR, pediatrician, with grandson, Daniel Perry 20M
Atlanta, Georgia
“Scholarships help attract the best and brightest to Emory, reduce their debt load, and give them the flexibility to go into whatever field they want. It is up to us to make sure Emory School of Medicine has the support it needs to draw and retain the best students, which is why making a bequest like mine is so important.”

Jonas “Jack” Shulman, MD
Executive Associate Dean of Medical Education and Student Affairs, retired
Atlanta, Georgia

We are happy to answer your questions and provide more information tailored to your individual interests.

emory.edu/giftplanning
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