




# Building a bridge to the future

A GIFT AND ESTATE PLANNING GUIDE FOR FRIENDS OF SUNY DOWNSTATE MEDICAL CENTER

picture by Robert C. Knapp, M.D.

## You Have the Power To Help Shape Our Future

CELEBRATING 150 YEARS OF RESEARCH, EDUCATION, AND PATIENT CARE

 **This September**, we kicked off the year-long celebration of our 150th anniversary serving the health care needs of the Brooklyn community—and the entire world. While we look back on all of our accomplishments over the years, it's important to recognize the importance of gifts from supporters like you.

In 1860, when a school of medicine was founded at the Long Island College Hospital, no one could have dreamed how much it would revolutionize medical education by bringing the teaching of medicine from university lecture halls to the bedside. 150 years later, SUNY Downstate Medical Center has become a nationally recognized institution that paves the way for new discoveries, trains the next generation of health care practitioners and researchers, and makes a substantial impact on the local community and the health of people around the world.

Downstate is now as recognizable and iconic an institution as the Brooklyn bridge that connects us to our surrounding communities. And we couldn't have accomplished all of this without generous gifts from supporters like you.

### How You Can Continue to Help

When you turn the page, you'll find information about how to be a part of our three-fold mission of education, research, and patient care—both today and tomorrow—through planned gifts. We hope you'll consider using one of these methods of support to make a long-term impact on our students, patients and research. If you need assistance at any time while planning your gift, please don't hesitate to contact Jo Ann Bradley, Ed.D at (718) 270-4418 or joann.bradley@downstate.edu. With your support, we can continue to lead the world in urban health care, medical training, and scientific research for years to come.



### Request Your Free Guide to Learn More

If you'd like more information about supporting Downstate please return the enclosed reply card. We'll send you a free guide that outlines the many ways you can make a long-term impact on SUNY Downstate.

### Inside this issue...

6 popular charitable plans / Your donations at work / Next steps



## Support SUNY Downstate Far Into the Future

# 6 Popular Charitable Plans

Whether you want to support our work today or design a plan that benefits Downstate after you're gone, you can feel good knowing that you're making a difference in many people's lives.

**There are many ways you can support SUNY Downstate's critical education, research, and patient care programs.** With just a little planning, you can make a significant impact on our students and patients while also realizing tax savings. You can make a gift that immediately supports our needs, or you can arrange a gift that is enacted upon your death, as a final way to leave your legacy. Plus, when you plan your charitable support, you often enjoy greater financial benefits than those available when you simply write a check.

Here are six of the most popular gift plans that will help us maintain and advance our quality programs and services far into the future.

### **one** Include Downstate in your will or living trust.

Called a charitable bequest, this form of giving is accomplished simply by including a few sentences in your will or living trust. Speak to your attorney or us for more information on the exact wording. Your estate is entitled to an unlimited estate tax charitable deduction for gifts to qualified charitable organizations such as ours.

### **two** Arrange a charitable gift annuity with us.

This gift consists of a simple contract between you and SUNY Downstate. You make a donation and we, in turn, pay you a fixed amount each year for the rest of your life. You qualify for a partial income tax deduction, and the rate of payment you receive doesn't fluctuate with the stock market, interest rates, or inflation. After your lifetime, the remaining balance is used to support our students, patients and research.

### **three** Give real estate.

A gift of real estate can be completed in a variety of ways. If you have a property without a mortgage and that has appreciated in value, you can give the property directly to Downstate. You'll receive an immediate income tax charitable deduction and avoid capital gains tax on the property's appreciation. Completing the gift is as simple as transferring ownership via the real estate title. Or, you can leave us the property through your will and your estate will qualify for an estate tax charitable deduction for the full value of the property.

### **four** Donate stock or other securities.

When giving securities that are worth more today than when you purchased them and that you've owned for more than one year, you will receive two tax benefits: You are entitled to



**When you plan a gift that supports SUNY Downstate,** you partner with us on our ongoing quest to nurture the Brooklyn community and improve the health of people around the world through education, research and patient care.



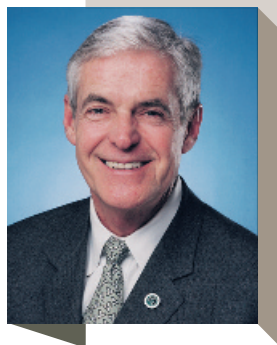
a federal income tax deduction based on the current fair market value of the securities, regardless of their original cost. And, you will be exempt from paying capital gains taxes on any increase in value—taxes you would pay if you had otherwise sold the securities.

**five** **Set up a charitable remainder trust.**

With this type of gift, you receive income (either a variable or fixed dollar amount) each year for the rest of your life from the trust. After your lifetime, the balance in the trust goes to the charities of your choice. You'll also qualify for a partial charitable income tax deduction, up-front capital gains tax avoidance, and possibly other tax benefits depending on how you arrange your trust.

**six** **Name us as beneficiary of a life insurance policy.**

When you first bought a life insurance policy, you most likely wanted to protect the financial stability of your family should anything happen to you. If your circumstances have changed so that the original purpose for the protection no longer applies, we hope you'll be considering naming SUNY Downstate as a beneficiary of a policy so we can use your gift to support our programs after your lifetime.



## Why I Give

"I've been a member of the Downstate community for 30 years! During that time, I have seen this extraordinary institution tirelessly build upon its 150 year tradition of innovation in education, research, and patient care. Downstate's programs, discoveries, and graduates consistently transform lives, locally, nationally, and internationally—with ever-increasing scope and impact.

Because of Downstate's enduring commitment to excellence, I've chosen to become a donor myself. It gives me great personal satisfaction to know that my contributions will extend the vital work being done here today far into the future.

Please join me today in supporting Downstate's leadership role as a world-class innovator!"

—James E. Cottrell, MD  
Chairman, Planned Giving Advisory Board  
Distinguished Professor and Chairman  
Department of Anesthesiology



**To learn more** about any of these ways to make a long-term impact on SUNY Downstate's students and patients, please contact Jo Ann Bradley, Ed.D at (718) 270-4418 or joann.bradley@downstate.edu.





By the Numbers  
**Your Donations at Work**

When you plan a gift that provides long-term support for SUNY Downstate, you make a significant difference in the lives of people in Brooklyn and around the world.

**75**  
percentage of students receiving financial aid

**14,000**  
average number of inpatients per year

**1,500**  
number of young men and women we train each year to become physicians, nurses, allied health professionals, and biomedical researchers

**50,000**  
square feet: the size of the new Advanced Biotechnology Incubator that will provide an unprecedented opportunity to combine our existing research expertise with that of start-up and mature biotechnology firms

**\$1,000,000,000+**  
The amount we return each year to the Brooklyn economy

**Take the First Step Today**

Want to know more about the many ways to support SUNY Downstate's education, research, and patient care programs? Here are two ways to find answers to your questions, both without obligation or cost:

**1. Request your free guide.**

Simply return the reply card, and we'll send you an informative guide that presents 15 options for supporting the medical center you care about.

**2. Contact us.**

Jo Ann Bradley, Ed.D at (718) 270-4418 or joann.bradley@downstate.edu is happy to answer any questions you may have about supporting our important work.

