Charitable Giving & Tax Tips

PLANNING MATTERS

Spring/Summer 2017

your legacy is part of our story —



A Legacy of Service and Learning

Hyman Endowment Promotes Access to Gifted Education

By Kimberly Marselas

Hopkins alumna and longtime educator Mary Hyman makes a significant commitment to the Center for Talented Youth and the bright and talented children it serves. ary Hyman's career in education took her from pre-school to after-school, from college-prep courses to graduate-level advising.

But programs she coordinated leading to the establishment of the Johns Hopkins Center for Talented Youth hold a special place in her heart; remembering 11- and 12-year-old students tackling subjects such as physics and advanced math still brings a proud smile to her face some 40 years later.

Hopkins psychologist Julian Stanley began identifying middle schoolers who were years beyond their grade-level in math and science in the early 1970s. He tapped Hyman, then director of education for the Maryland Academy of Sciences, to design Saturday morning sessions for the brightest among them.

Hyman, who earned a master's degree in education from Hopkins in 1976, recruited

local experts to help teach subjects from astronomy to Earth science.

"It wasn't much at first," says Hyman, an original member of CTY's advisory council. "But we thought, if he keeps identifying them, we'll do the best we can.... CTY has grown like crazy, and I've always remained interested."

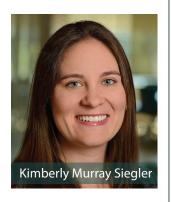
Stanley formally founded CTY at Hopkins in 1979, and immersive summer experiences and international and online options for some of the nation's and world's most promising students would follow over the next four decades.

In 2000, Hyman and her husband, financial planner Sigmund "Sig" Hyman, created the Sigmund and Mary Hyman Scholarship Endowment to ensure talented students from families of varied financial

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Handle with Care: How Hopkins Works to Ensure Your Wishes Are Met

By Kimberly Murray Siegler, Esq. Assistant Director of Fiduciary Services



Realizing a Legacy Gift

When the time comes, we take several steps to make sure your gift is used as intended.

ou took the important steps of planning your estate, ensuring your loved ones are cared for and choosing a personal representative. Like many individuals, you may have also included a gift from your estate to a charitable organization, such as Johns Hopkins University and Medicine.

Here at Johns Hopkins, legacy gifts — gifts donated through a will, trust, or beneficiary designation — provide critical support for our people and programs. I am the point of contact for all legacy gifts to Johns Hopkins, and an important part of my role is to ensure Johns Hopkins honors your wishes for your legacy gift. Below are questions I'm commonly asked about how legacy gifts are received and distributed.

How does a legacy gift get to the area it is intended to benefit?

After a personal representative (such as an attorney, advisor, or loved one) notifies Johns Hopkins of a donor's passing, I determine whether the Office of Gift Planning has documentation of the donor's legacy gift. If the donor previously shared his or her intention with us, the process is often straightforward. I review our gift documentation and the legal documents, and I often speak with the donor's personal representative to confirm the donor's wishes. I then work with the area of Hopkins benefitting from the gift to ensure the gift is deposited in the correct Johns Hopkins account.

In many cases, our office learns of a legacy gift for the first time from a donor's personal representative. In general, I follow the same steps as above to process the gift. If the donor's intent is unclear, I take various additional steps to determine the appropriate area of Hopkins to receive the gift.

How long does the legacy gift distribution process take?

The process usually takes between four and eight months. However, various circumstances can cause estate administration to take more time. One example I see regularly is when the personal representative needs time to market and sell real estate.

What can I do to help ensure Johns Hopkins honors my wishes?

The best way to guarantee your legacy gift is directed as you intend is to share your plans with us during your lifetime. Johns Hopkins has many schools, divisions, and funding opportunities, so accurate language, including naming the correct legal entity, is important.

For example, while a doctor may treat patients in the Johns Hopkins Hospital, his or her research is typically supported by the Johns Hopkins University. Our gift planning advisors can review the language in your planning documents to confirm it accurately reflects your intentions. We protect the privacy of all information shared, and if your intentions change, you can update your plans with us at any time.

Share Your Plans

If your plans include a gift to Johns Hopkins, please let us know. We would like to thank you, make sure we understand your wishes, and welcome you into the Johns Hopkins Legacy Society. Call 410-516-7954 or 800-548-1268, or email giftplanning@jhu.edu.

means continued to have access to such opportunities. Late last year, Mary Hyman pledged a significant gift from her estate to shore up the endowment, support research into effective programs for gifted and talented children, and finance marketing efforts that could broaden CTY's reach.

The fund, named after the couple, specifically provides scholarships for highly qualified students interested in advanced studies.

"This latest gift reflects the length, breadth, and depth of Mary's commitment to CTY and the students we serve," says Elaine Tuttle Hansen, CTY's executive director. "It will significantly advance our top three strategic priorities: access and affordability for qualified students from all backgrounds through more need-based scholarships for middle-income families; research on the most effective educational programs to develop the full potential of the most advanced learners; and advocacy for talent development."

CTY's focus is to be a leader in the education of advanced learners worldwide, to open access to CTY's opportunities for top students from all backgrounds, and to originate and communicate research on recognizing and developing the talents of students of great academic promise.

Hyman, who helped develop classes in geology, marine sciences, and astronomy for CTY summer residential sessions, has stayed connected to CTY by visiting summer sessions in the U.S. and Ireland. She says she would like to see CTY, especially the summer session component, expand to other parts of the U.S. and more international sites, and maintain its stringent standards and quality programming.

She recalls the program's early years when

some of her co-workers at the Maryland Science Center struggled to afford CTY enrollment on average incomes, especially if they had multiple children who qualified.

In addition to offering opportunities to explore such advanced topics as astronomy and paleo-biology, Hyman cites CTY's unique social environment as critical for young students who might struggle to find likeminded peers at their home schools.

After leaving the Maryland Science Center, Hyman moved to Loyola University, where she served as coordinator of science education programs and the Institute for Childhood Education at Loyola University for 26 years. She retired late last summer.

She remains active in education and art circles, serving on volunteer boards of Franklin and Marshall College, her husband's alma mater; Goucher College, where she earned her undergraduate degree; and the Baltimore Museum of Art.

An avid reader, she also takes classes regularly through the Osher Lifelong Learning Institute at Johns Hopkins.

"Education has always been important to me," says Hyman. Her daughter holds a bachelor's and a master's in the Hopkins Writing Seminars, and Hyman's home is a testament to a family legacy of service and learning. Her grandfather's microscope from Tufts Medical School and her book collection are given prime spots among her prized collection of American paintings and sculptures.

Hyman views CTY as a program that stimulates students who most need the challenge, inspiring them to pursue their own passions. Her estate gift will ensure that promise for generations to come.

A World Leader in Gifted Education

- More than 9,450 kids participate in CTY summer programs at 26 locations. Another 13,000 take online courses, while 5,500 enroll in Family Academic Programs with their parents.
- CTY is accredited for grades K through 12 by the Middle States Association of College and Schools Commissions on Elementary and Secondary Schools.
- Alumni include the co-founder of Google; the CEO of Facebook; and leaders in the sciences, art, and government.

A LEGACY IS

Steve Clark, MHS '79:

Supporting the Future of Water Safety

For most Americans, clean, safe drinking water is a given.
Water engineer Steve Clark works to keep it that way as an intelligence and technology advisor at the Environmental Protection Agency's National Homeland Security Research Center. Here, he discusses his

passion for water safety.

By Kimberly Marselas



Steve Clark

university's legacy of leadership in water quality education,
Steve Clark has made a commitment from his estate to the Bloomberg School of Public Health to support a new stream

of water warriors.

How did Johns Hopkins influence the flow of your career?

"Hopkins Professor Abel Wolman was the 'godfather' of sanitary engineering. I saw him lecture a few times. Vincent Olivieri, professor of environmental health, was my lab guy, the director of my master's research. We had a conversation before he died in 1991 that helped me reconnect with Hopkins. Vinny convinced me we needed to have more people teaching water, and 25 years later I am still engaged."

Tell us about your work in water security.

"We're looking at the potential for people to contaminate or damage our water by intentional cause and determine the best ways to detect when it's happened. There are 83,000 chemicals in the world. We can't test for them all. So we're constantly using technical expertise and technological advances to ensure we keep as many out as possible. We need to be able to get to these things as quickly as we can."

How does expertise like yours trickle down to local water providers?

"We work with the U.S. Geological Survey for access to satellites that help us measure things

like algae in the Chesapeake
Bay and Homeland Security
to develop cybersecurity plans
that prevent the hacking
of pumps and switches
that are controlled by
computers. Once we
develop plans, we send
out easy-to-understand
guidance through all of the
water associations."

As a member of the school's Global Alumni Network Advisory Council, what skills do you see as essential for young public health professionals?

"We need people with technical expertise but also the leadership to convince others to understand why water initiatives are important, to get across those critical explanations. If you need to do something, do it now, push the button. What happened in Flint [Michigan] was because certain people didn't understand the seriousness of lead in kids' water."

How will your scholarship support further that mission?

"I had a scholarship, and I probably wouldn't have been able to afford my graduate degree without it. As fellowships from the federal government dry up, we need other ways to entice bright people to come into this field and stay committed to it."

You take water seriously. Do you ever have time to enjoy it?

"I swim as often as I can. But lately, I've sort of become obsessed with the chemistry of my pool."

Their Legacy Told

Johns Hopkins University and Johns Hopkins Medicine are grateful to the generous alumni and friends who have remembered us in their estate plans and other planned gifts. We now celebrate a few of these benefactors and honor their legacy.



Jeanne LeDoux's gift supports research in macular degeneration.

A lifelong Baltimore resident and wife of a local physician, **Jeanne L. LeDoux** had a high regard for the work and research done at Johns Hopkins. Despite being diagnosed with macular degeneration and

losing her vision, she continued to maintain her independence. She left a gift from her estate to the Wilmer Eye Institute to help find a cure for this disease that affects more than 8 million individuals over the age of 50.

Phillip T. Dunk Jr., A&S '45, was generous to the charitable organizations that were important to him, including his alma mater. He included a gift from his estate to the Zanvyl



A scholarship honoring his parents is among Phillip Dunk's gifts.

Krieger School of Arts and Sciences to establish a memorial scholarship in honor of his parents. His generosity also extended to the Peabody Institute and the School of Medicine.

After being diagnosed with pancreatic cancer, **Linda Rubin** found care and treatment at the Skip Viragh Center for Pancreas Cancer Clinical Research and Patient Care at the Sidney Kimmel Comprehensive Cancer Center. A

generous gift from
her estate established a fellowship to support
physicians under
Drs. Laheru and
Jaffee, the center's co-directors,
striving to develop
better treatments
for pancreatic cancer.



Linda Rubin's legacy advances research in pancreatic cancer.



HUB*

From the Johns Hopkins News Network

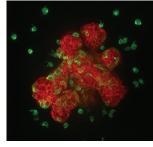
The Hub is the news center for all the diverse activity going on at Johns Hopkins. To see what's new, important, and just worth sharing, visit hub.jhu.edu.



Since 1942, the Johns Hopkins **Applied Physics Lab** has created and perfected some of the most pivotal technologies of the modern era. As it celebrates its 75th anniversary, APL continues to conduct research critical to national security, while advancing the frontiers of science, technology, and engineering.



The Johns Hopkins Carey Business
School has earned accreditation from
the Association to Advance Collegiate
Schools of Business, the world's
leading authority on the quality
assurance of business school
programs. The school was founded in
2007 on the principle of teaching
business with humanity in mind.



A new study by Johns Hopkins scientists provides evidence that random, unpredictable **DNA copying** "mistakes" account for nearly two-thirds of the mutations that cause cancer. Across the 32 cancer types studied, the researchers estimate that 66 percent of cancer mutations result from copying errors.



Why Do You Give?

Johns Hopkins University and Johns Hopkins Hospital were founded with a single gift from Baltimore businessman Mr. Johns Hopkins. It was, at the time, the greatest act of philanthropy in the country. More than 140 year later, his legacy lives on through the countless individuals whose generosity provides vital support to Johns Hopkins University and Medicine. Here's what you told us.

"Having the name Johns Hopkins as my education was the biggest factor in my hirings."

—BARBARA THOMAS YINGER, SCHOOL OF NURSING '58

After we lost our daughter, Corinne, in the Baltimore Harbor Water Taxi accident in 2004, my wife, Karen, was taken to the Hopkins emergency room and then the cardiac intensive care unit with post-traumatic stress cardiomyopathy. Hopkins had just published a groundbreaking study of this, heretofore, unknown condition and saved her life." —DENNY SCHILLINGS

My husband got his education through the GI bill, and we both felt we should help others at JHU. Two of our boys are alumni."

—DOROTHY EINOLF

"7 received a tuition fellowship to SA7S and want to give back."

— ANITA FRANCES BROWNSTEIN,

SCHOOL OF ADVANCED INTERNATIONAL STUDIES '71

I believe in Johns Hopkins Medicine. The institution provides hope in the face of desperation, authoritative counsel in the face of confusion and successful outcomes that are usually better than promised. It sets a good example for the medical profession and it deserves recognition."

-RICHARD MIZELL

The excellent education I received, and the amazing care my husband, Lou, received for many years at Hopkins."

— NANCY GRASMICK,
SCHOOL OF EDUCATION '80 (EDD)

Hopkins, in period 1947-51, prepared me well for my professional career at Western Electric Co. Secondly, I am always thrilled to sing with the JHU Choral Society.... Thanks for this lifetime connection."

—WILLIAM "BILL" J. HYDE,

WHITING SCHOOL OF ENGINEERING '51

My husband, William "Bill" E. Buchanan, and my granddaughter, Emily Daubert, both were graduates of the Writing Seminars. My daughter, Amy Buchanan, graduated in Applied Mathematics. In addition, Bill Buchanan maintained his involvement with Hopkins for the rest of his life."

-ANNE BUCHANAN

I am especially interested in the research being done on Parkinson's disease. I am also interested in our young people of today and their education." —JANE KRIETE AWALT

To support Dr. Peter Rowe's research on orthostatic intolerance. Our daughter was a patient, and Dr. Rowe was a godsend! He continues to answer her questions and concerns over 10 years later."

—JANET AND NICK
VIDNOVIC

Simply put, I give because of the excellent treatment for my Fuchs Dystrophy and glaucoma and for the benefit of others who come to the Wilmer Eye Institute."

—JOHN B. WHEELER

PLANNING MATTERS

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JOHNS HOPKINS UNIVERSITY & MEDICINE

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"The Baltimore Scholars Program is very dear to my heart."

—JULES KIRSCH, KRIEGER SCHOOL OF ARTS AND SCIENCES '51