

Healthy Investments

For alumni and friends of A.T. Still University

SPRING 2018

PLEDGE TO DAN MARTIN COURT INITIATIVE SPARKS PLANNED GIFT ARRANGEMENT

The appeal to fund a new basketball court in the Thompson Campus Center honoring Dan Martin, an A.T. Still University (ATSU) icon, has launched an avalanche of giving. Over \$115,000 has been raised in gifts and gift commitments toward the initiative's \$300,000 fundraising goal.

James Meyer, DO, '88, and his wife, Ann, are among the University's generous alumni and friends supporting this important effort with a major charitable gift commitment. "I was approached to make a pledge to the Dan Martin Court and was happy to do so as I had spent so much of my time in Kirksville at the Thompson Campus Center, and remember Dan as always being extremely accommodating," explains Dr. Meyer.

Dr. Meyer enrolled at ATSU's Kirksville College of Osteopathic Medicine (ATSU-KCOM) following his graduation from the University of Michigan-Ann Arbor in 1984, when the Thompson Campus Center was a brand new facility. Like many others, Dr. Meyer grew to enjoy Kirksville and its small town atmosphere.

"Becoming involved with various clubs and organizations was helpful in my development during my years in Kirksville," Dr. Meyer states. "I don't think I would have had nearly as much enjoyment without the close study groups that we arranged. Some of my fondest memories and lifelong friendships have come from Kirksville."



Dr. James Meyer '88 and his wife, Ann, made a gift that will help make a brighter future for our students.

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Now with a thriving pulmonology and sleep medicine practice in Fort Dodge, Iowa, Dr. Meyer credits ATSU-KCOM for much of his professional success.

“I honestly believe that I would never have become the successful physician that I am without ATSU-KCOM. We worked hard, played hard, and always were driven by osteopathic principles. The manner in which I approach patients is directly attributable to the teachings I received at ATSU-KCOM and in my training,” reflects Dr. Meyer.

This sense of gratitude and ATSU’s need for charitable support led Dr. Meyer and his wife to more deeply consider the legacy they would like to create.

“I have been a regular donor to ATSU-KCOM, but when I looked at my total giving I was disappointed and wanted to make a more substantial gift.”

This observation led the Meyers to not only support the Dan Martin Court initiative, but also to include a bequest for ATSU-KCOM in their estate plan. This deferred gift arrangement is very useful for ATSU-KCOM, as it will one day result in an unrestricted gift to address and support the University’s greatest needs.

By taking action today and documenting his gift on the Statement of Future Gift Intent form, Dr. Meyer is accomplishing his desire to contribute to the preservation and enhancement of quality osteopathic medical education at the founding school.

“It makes me feel great that I can give back to a very special institution,” Dr. Meyer says. With his help, ATSU-KCOM is much closer to making the Dan Martin Court—and an even brighter future for ATSU-KCOM and its students—a reality.

Documenting your planned gift with the enclosed Statement of Future Gift Intent form helps ATSU plan for the future and starts a conversation to better ensure that your final wishes are carried out. If you have any questions, please contact Brad Chambers at 660.626.2494 or bradchambers@atsu.edu.



GET ORGANIZED

Provide a road map for your loved ones with where they can find key documents and whom to contact in case of your absence. Send for the FREE organizer tool *Your Guide to Locating Important Documents* using the enclosed reply card today!



GIFTS THAT COST YOU NOTHING DURING YOUR LIFETIME

Gifts in your will and other gifts made after your lifetime are important sources of financial support for ATSU. The continuation and expansion of this tradition of remembrance will contribute to the University's future financial and academic strength.

You can make a specific gift to ATSU of cash, securities, real estate, or other property through your will, trust, or via a codicil. The following are examples of how you may designate your gift. Consult an attorney to be sure you have a properly drafted legal document.

Unrestricted gift

This is a gift for our general purposes, to be used at the discretion of our governing board. A gift like this—without conditions attached—is directed to our most pressing needs.

Sample language:

I give to A.T. Still University, Kirksville, MO, (the sum of \$_____ or _____ percent of the rest, residue, and remainder of my estate) for its general purposes.*

Restricted gift

This type of gift specifies how your funds are to be used. It is best to consult us before you execute your will to be certain your intent can be fulfilled.

Sample language:

I give to A.T. Still University, Kirksville, MO, (the sum of \$_____ or _____ percent of the rest, residue, and remainder of my estate) for [special purpose or project].*

*Please note that you may replace the University with a specific college at ATSU. Colleges include Kirksville College of Osteopathic Medicine, School of Osteopathic Medicine in Arizona, College of Graduate Health Sciences, Arizona School of Dentistry & Oral Health, Arizona School of Health Sciences, and Missouri School of Dental & Oral Health.

“ I wanted to give back to the institution which I consider to be the cornerstone of my professional and financial success.”

—James Meyer, DO, '88

SUPPORT ATSU

Scan the QR code below with your smartphone or tablet to learn how!



PUT FAMILY FIRST

Naming A.T. Still University as a beneficiary in your will is a simple way to support our future. But maybe you've hesitated because you're unsure about how much to give.

Because life is unpredictable and the value of your assets is likely to rise and fall, you don't want to risk that someday your charitable gift could outweigh the well-being of your family. Fortunately, there's a solution.

PERCENTAGE GIVING

Instead of a fixed amount, consider gifting a percentage of your estate or of specific assets. That way, gifts to loved ones and to organizations such as ATSU remain proportional—no matter how your estate fluctuates.

Here are three simple ways to put family first while supporting our students:

1. Gift a percentage of your estate to ATSU in your will.
2. Leave us a percentage of your residual estate (the portion of your estate that remains after all gifts have been made and all claims of the estate are satisfied).
3. Name ATSU as a beneficiary of a percentage of your life insurance policy or retirement account.

Every Gift Counts! Even a small percentage of your estate makes a big impact on us. Contact Brad Chambers to learn more about supporting ATSU's future while putting family first.

A.T. STILL UNIVERSITY | ATSU

Missouri campus

Robert J. Behnen
Associate Vice President for University Advancement

Brad Chambers
Director of Development

Scott Simmons
Director of Development

Alexandra Kent
Associate Director of Development

Craig M. Phelps, DO
President

Shaun Sommerer, PhD
Vice President for University Advancement

866.626.2878, ext. 2395
atsu.myplannedgift.org

Arizona campus

Trish Bere'
Senior Director of Development

Karen DeCarlo
Director of Development



Statement of Future Gift Intent

Please print

Donor name(s)

Spouse/partner name

Mailing address

City

State

Zip code

Preferred email address

Cell phone

Home phone

Gift information

I/we have made provision(s) to benefit A.T. Still University in the following manner(s):

For your records, I/we have enclosed the relevant portion of my/our estate plan document that pertains to my/our gift (optional).

Yes, document enclosed No, document not enclosed

Bequest (in will or trust)

- Dollar amount
- Stock or property
- Percentage (____%)
- Residuary

Beneficiary designation

- Retirement account
- Life insurance policy
- Bank account (POD)
- Investment account (TOD)

Other gift type:

- Charitable gift annuity
- Charitable lead trust
- Charitable remainder trust
- Other (specify): _____

Designation

Today's estimated value of my/our future gift to the University is approximately \$ _____

The gift is: Unrestricted Restricted as follows: _____

- | | |
|----------------------------------------------------------------------------|------------------------------------------------------------------------------|
| <input type="checkbox"/> A.T. Still University (ATSU) | <input type="checkbox"/> Kirksville College of Osteopathic Medicine (KCOM) |
| <input type="checkbox"/> Arizona School of Dentistry & Oral Health (ASDOH) | <input type="checkbox"/> Missouri School of Dentistry & Oral Health (MOSDOH) |
| <input type="checkbox"/> Arizona School of Health Sciences (ASHS) | <input type="checkbox"/> School of Osteopathic Medicine in Arizona (SOMA) |
| <input type="checkbox"/> College of Graduate Health Studies (CGHS) | |

University policy requires a minimum \$25,000 gift to create a named endowment.

Donor recognition preference

This future gift for A.T. Still University entitles donor(s) to membership in the Legacy Society. To ensure your recognition preferences are honored, please select one of the following options:

- A.T. Still University has my permission to publish my/our name(s) in publications and on its website as appropriate.
Note: dollar amounts will remain confidential
- Please do not publish my/our name(s).

Acknowledgement

For gift crediting purposes, I (we) should notify A.T. Still University if changes are made to my (our) estate plan(s) that will affect the above provisions. It is understood that all bequest and beneficiary designations stated herein are revocable and are not binding upon my (our) estate(s).

Donor signature

Date

Birthdate

Spouse/partner signature

Date

Birthdate

A.T. Still University and its employees do not provide tax or legal advice. Prospective donors should consult with their legal and financial advisers.

Please return this form to A.T. Still University Development, 800 W. Jefferson St., Kirksville, MO 63501, or development@atsu.edu. Call 660.626.2180 with any questions.