Growing up in New York, brothers David, DO, '74 and Eric Greenberg, DO, '74 had never heard of osteopathic medicine, let alone held aspirations to become osteopathic physicians. Eric was in graduate school at Columbia University training to become a research toxicologist when, suddenly, fate stepped in…

It was 1969, and New York Post publisher Byron Greenberg learned during a visit to the newsroom the upcoming National Convention for Osteopathic Medicine was to be held in New York City. He offered his son Eric a press pass to attend. That offer changed the course of Eric's life.

He found himself absorbed in the convention’s lectures and the Osteopathic concepts that were shared. During the reception, he met Dr. Morris Thompson, then president of Kirksville College of Osteopathic Medicine (ATSU-KCOM). “He must have seen something interesting in my inquiries as he took me under his wing, introducing me to

many of the faculty in attendance and invited me to be his guest for the remainder of the conference,” Eric recalls. “At the conclusion of the conference, President Thompson asked me, ‘You are going to apply for next year, aren’t you?’”

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NAMING OF PERFORMANCE ASSESSMENT CENTER HONORS BYRON AND HELENA GREENBERG

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Fate favors the fearless, and Eric enthusiastically applied, soon finding himself in classes with beloved anatomy professor and University icon “Duke” Snyder. “What a difference that week made in my life,” recalls Eric. “I completely changed my career path after that experience.”

This unexplored path led to careers that allowed the brothers to spend their lives in a profession they thoroughly enjoyed while rewarding them with professional and financial success. “It is the rare person who is genuinely engaged in a profession they truly love,” Eric notes.

As an expression of gratitude to the University and to their parents for their sacrifice, David and Eric chose to fund a naming opportunity at ATSU-KCOM with a six-figure gift from a charitable remainder unitrust.

“We wanted to show our appreciation for the opportunity ATSU-KCOM had given us while honoring our parents, who undertook the financial burden of simultaneously putting two sons through medical school, never once worrying about this burden or expecting us to reimburse them for this tremendous commitment to our professional careers,” says Eric.

Choosing to name a facility dedicated to student assessment and learning seemed to be the perfect choice. The newly named Byron and Helena Greenberg Performance Assessment Center provides learning, testing, and, when necessary, remediation experiences to validate a level of clinical skill competence that is appropriate for medical students entering postgraduate training.

“My only regret is that David was not able to live long enough to see this wonderful center and attend the dedication ceremony to witness the joy I felt as President Phelps unveiled the naming plaques of the Byron and Helena Greenberg Performance Assessment Center,” Eric says. “It may be the most rewarding feeling I have ever experienced, knowing how the center will enhance the education and training experiences of future students.”

To learn more about ways you can honor loved ones and your time at ATSU with a planned gift, contact Brad Chambers at bradchambers@atsu.edu or 660.626.2494.
CHARITABLE TRUSTS: ENSURE THE FUTURE

Whether you’re concerned about outliving your assets in retirement or supplementing your retirement income, you’re not alone. Many ATSU supporters who feel the same way find that a life income plan is an attractive alternative.

One such plan, a charitable remainder trust, allows you to benefit a charitable institution such as A.T. Still University and receive an income stream in return.

With this type of gift, you, or other beneficiaries if you choose, receive regular income for life (or for a period of up to 20 years). At the end of the trust term, the balance in the trust supports the future of healthcare. Another benefit of a trust is that you may gain freedom from investment management.

You can fund a charitable trust with cash, but by funding your trust with long-term appreciated assets, you receive a number of additional benefits.

• You eliminate up-front capital gains tax.
• You may also increase your lifetime income as compared to the yield on the contributed assets.

Two Choices

There are two types of trusts that work this way: charitable remainder annuity trusts and charitable remainder unitrusts. While both trusts allow you to receive an income tax charitable deduction, there are small, but important differences.

Charitable Remainder Annuity Trust

• You receive a regular, fixed-dollar income based on a percentage of the trust’s initial assets.
• You may not make additional contributions to the trust.

Charitable Remainder Unitrust

• You receive a regular, variable-dollar income (the amount you receive is a set percentage of the current value of the unitrust, determined annually).
• You may make additional contributions to the trust.

Involve the Experts

Set up a time to meet with your estate planning attorney. He or she can help you ensure that your charitable remainder trust is properly set up to achieve your personal financial and philanthropic goals.

See What a Trust Can Do

We’d love to discuss how your generosity will be put toward supporting tomorrow’s health professionals. We can partner with you and your estate planning attorney as you take the next steps. Simply contact Brad Chambers at bradchambers@atsu.edu or 660.626.2494 for a no-obligation consultation.
AVOID TAXES TO LEAVE A GREATER LEGACY AT ATSU

Wouldn’t it be nice if you could avoid some of life’s annoying fees: at the bank, on your cell phone bill, or when you stay at a hotel? And of course, there’s one of the biggest fees of all: capital gains tax.

When you leave a legacy for the institutions that mean the most to you, such as A.T. Still University, you want to make as big an impact as possible—on students and on the future of ATSU. That’s hard to do if the government takes a large portion of your gift first.

That’s why, if you are thinking about using stock to make an impact at ATSU, donating the stock is a better option than selling. When you give us appreciated securities that you’ve owned for more than one year, you may receive two tax benefits:

1. You are exempt from paying capital gains taxes on any increase in value—taxes you would pay if you sold the stock.
2. You are entitled to a federal income tax charitable deduction based on the current fair market value of the securities, regardless of their lower original cost, if you itemize.

How to Donate Stock to ATSU

If you have the physical securities: Hand-deliver them to us or mail us the stocks and stock power separately.

If you don’t have possession of the physical securities: Instruct your broker to electronically transfer your intended shares and notify us once the transfer is complete.

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