

Retired researcher Allen T. Ansevin, Ph.D., has made an estate gift to MD Anderson to support future discoveries.

## Funding new discoveries

As a retired researcher and educator, Allen T. Ansevin, Ph.D., understands the importance of giving back. That desire to make a difference led him to join The University of Texas MD Anderson Cancer Center faculty in 1964. Later, he benefited from research advances as a patient who was treated for basal cell carcinoma at MD Anderson in 2008 and 2013.

Motivated to support future discoveries, Ansevin made an estate gift to the graduate school where he once trained the next generation of scientists. His charitable gift annuity ultimately will support basic research education at the MD Anderson Cancer Center UTHealth Graduate School of Biomedical Sciences.

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## FROM THE LEGACY SOCIETY

### Creative ways to meet needs

As darkness approaches, cars line up in front of the big screen, like an iconic scene from 1958. Our COVID-19 world has seen an unexpected revival of drive-in movies. As fewer people go to regular theaters because of the virus, creative entrepreneurs are installing "pop-up" drive-ins, satisfying a pent-up desire for safe entertainment.

In challenging times, people find creative ways to reassert control and find safety in an uncertain world. We also look for ways to help others, making strategic gift planning important. The right gift options for you can be easy to identify, assess and implement. And like a pop-up drive-in, you can be creative in choosing how to meet charitable goals and provide for others.

Thank you for supporting us.

*Darrow Zeidenstein*

Darrow Zeidenstein, Ph.D.  
Senior Vice President  
and Chief Development Officer





Houston was ripe with possibility when Ansevin arrived from New York with a doctorate in biophysics. The collaborative environment of MD Anderson appealed to him. “I was pleased that I could be associated with a first-class cancer hospital and with faculty who were devoted to rigorous research,” he says. “Our hope was that applications that come from basic research could be extended to cancer research.”

At the MD Anderson UTHealth Graduate School, Ansevin enjoyed teaching emerging researchers. “Both faculty and students benefited from the collegial atmosphere,” he says. He retired as a professor of physics in 1986.



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*- Allen T. Ansevin*

Ansevin finds inspiration in knowing that his contribution to the MD Anderson UTHealth Graduate School will spark learning for generations to come.

“It is very important to have academic research alongside clinical research,” he says. “Major advances come from academic research, asking questions about how things work. There was a positive atmosphere at MD Anderson that facilitated that type of thinking.”

Ansevin had supported the MD Anderson Annual Fund for many years when he began to consider making an estate gift. He opted to establish a charitable gift annuity by contributing appreciated stock. Structured as a lifetime gift, it will generate a consistent income stream for the duration of his life. In addition, it will provide a tax advantage that enables him to maximize his contribution.

Through this generous gift, Ansevin became a member of the MD Anderson Legacy Society, a special circle of forward-thinking individuals who choose to invest in the future with a planned gift to benefit MD Anderson.

## A lifesaving legacy

A man of vision and foresight, Monroe Dunaway Anderson, banker and businessman, created the MD Anderson Foundation. Two years after his death, his foundation provided funds for the establishment of what is now The University of Texas MD Anderson Cancer Center.




MONROE DUNAWAY ANDERSON | FOUNDER

Building on that initial estate gift, the MD Anderson Legacy Society was created to honor and thank those who, like Anderson, have named our institution in their estate plans.

*To become a member of the Legacy Society, simply let us know you've included MD Anderson in your estate plan.*

The benefits of an estate gift are immeasurable and enable you to support ongoing research and other lifesaving programs at MD Anderson. Creating a legacy of giving beyond your lifetime requires wisdom, vision and a plan tailored to your unique circumstances.

The Office of Trusts, Estates & Gift Planning is available to assist you in creating a plan that best expresses your desire to advance MD Anderson's mission to end cancer.

 To join the Legacy Society, contact us at **866-928-9494** or [plannedgiving@mdanderson.org](mailto:plannedgiving@mdanderson.org)



# Three ways to make an impact

COVID-19 has heightened our interest in the organizations we care about and our personal philanthropic legacies. Several easy-to-implement gift options can make an immediate impact:

## 1 – Appreciated stock

A gift of appreciated stock held more than one year is a tax-wise way to help MD Anderson today. Compared to cash, a gift of stock provides an important benefit: You pay no capital gains tax on the appreciated value. And, when you itemize your tax return, the gift qualifies for a deduction equal to the stock's current value.

**Example:** Joni purchased stock for \$10,000. The stock is now worth \$40,000. She gives MD Anderson half the stock — valued at \$20,000, with a basis of \$5,000. Because she itemizes her return, Joni's gift qualifies for a deduction of \$20,000, and she pays no capital gains tax on the \$15,000 of appreciation.\*

To avoid capital gains tax, you must transfer the stock directly to MD Anderson — do not sell it.

## 2 – Your donor-advised fund

A grant from your donor-advised fund comes from money already set aside for charitable giving, so there is no change in your available assets to meet daily needs or realize future financial goals.

## 3 – A gift from your IRA

If you are an IRA owner age 70½ or over, consider making a gift through a qualified charitable distribution (QCD).

- The amount transferred is excluded from your income for federal tax purposes — you owe no tax on the transfer!
- The amount you give counts toward your required minimum distribution, when one is due.
- Transfers up to \$100,000 (annual aggregate limit) qualify for this favorable tax treatment each year (but contributions to an IRA after age 70½ reduce QCD amounts).

Ask your account custodian to make your qualified charitable distribution directly to MD Anderson.

*If you make a gift, please inform us, so we can thank you and confirm it was received.*

*\*Example for illustrative purposes only.*

## Steadfast in our mission

Without a doubt, 2020 brought more than an abundance of change and uncertainty due to COVID-19 — from new legislation to changes in work arrangements to restricted social activities and family gatherings. Even with the rollout of vaccines, 2021 promises to bring additional changes and challenges.



But with your help, we will continue to fulfill our mission to end cancer. Working together, we can identify a strategy that fits your planning needs, while providing meaningful support to MD Anderson.

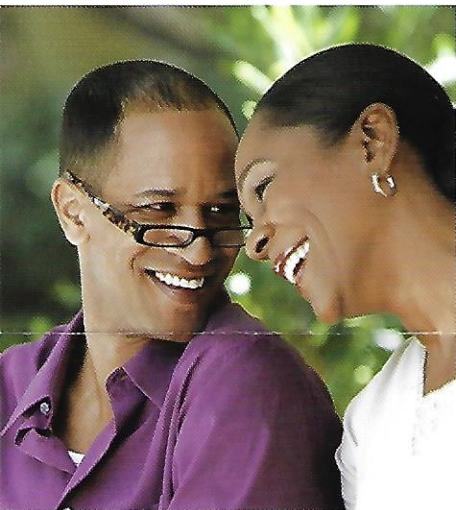
Thank you again for your generous and thoughtful support. If you have questions about personal planning and charitable giving at any time in the months ahead, please get in touch.

*The information contained herein is offered for general informational and educational purposes. You should seek the advice of a financial planner or attorney for applicability to your situation.*



# Plan now, give later

Some gift-planning options are specifically designed to focus on future benefits, and many are simple to implement.



## A gift in your will or revocable living trust

A will or living trust allows you to plan now and give later, keeping lifetime control of the gift property.

- Make a gift of a specific asset or amount of money. This could be cash, stock or other property.
- Leave a percentage of your estate to MD Anderson.
- Provide a residual gift — what is left in your estate after all other obligations have been met.

## Beneficiary designations

You can name MD Anderson as a beneficiary of an existing life insurance policy, retirement account, donor-advised fund account or bank account.

- The primary beneficiary receives proceeds or funds first.
- The secondary or contingent beneficiary receives funds only when the primary beneficiary cannot.
- You may specify exactly how the proceeds or funds are distributed by defining the portions or percentages that beneficiaries will receive.

By keeping these designations current, you can make certain your assets are used to meet your personal and charitable goals.

## A strategic next step

For more information about strategic gift-planning options — from simple to complex — contact us at **866-928-9494**, email [plannedgiving@mdanderson.org](mailto:plannedgiving@mdanderson.org) or return the enclosed card. It would be our privilege to help you.

## Should you consider a charitable gift annuity?

A charitable gift annuity is an uncomplicated gift that benefits both charities and donors.

With a charitable gift annuity, when you make a gift to MD Anderson, we agree to pay you and/or your designated beneficiary (two people maximum) a fixed amount periodically for life. Because these payments are fixed, they are not affected by interest rates or fluctuations in the financial markets. In addition, you enjoy the following benefits:

- Contributions qualify for an immediate charitable tax deduction if you itemize.
- If you use appreciated property to fund the gift annuity and you are the income beneficiary, capital gains tax due on the property can be spread out over your lifetime.
- Part of each annuity payment is tax free until you reach life expectancy.

Let us know if we can help you determine if this gift option is the right fit for you.

*This newsletter explores simple gift options. For more information, please call or email us, or use the card provided. Be sure to ask for our free booklet, Plan Now, Give Later.*