



THE HERITAGE CIRCLE MIDWESTERN UNIVERSITY



FINANCIAL AND PHILANTHROPIC PLANNING IDEAS

FALL 2019

CCOM ALUM GIVES TO PROVIDE OPPORTUNITIES

As many physicians appreciate, fulfillment in life is most often found in serving others and in giving back. When Lewin Wyatt, Jr., D.O., '78, applied for medical school, he had been in the workforce in sales for a pharmaceutical company for several years. His time at the Chicago College of Osteopathic Medicine (CCOM) made it possible for him to pursue his dream of becoming a physician. Now, nearly 42 years and a successful career later, Dr. Wyatt and his wife Lillie have served others and are giving back again by naming CCOM as a beneficiary in their estate plans.

Dr. Wyatt grew up in Chicago as the oldest of three children. He met Lillie in high school while attending a friend's party. Immediately after graduating from high school, Dr. Wyatt joined the United States Army and received training at Walter Reed to become a Medical Lab Technician. After serving three years in the U.S. Army, Dr. Wyatt attended the University of Illinois at Chicago (UIC), while Lillie attended Marion College in Indianapolis.

After graduating from UIC, Dr. Wyatt accepted a position in sales for the Upjohn Pharmaceutical Company, where he worked for the next seven years. During those years at Upjohn, he came to recognize

the significant need for quality healthcare for underserved families living in the city. Feeling that he could help fill those needs, he decided to pursue a career in medicine and began looking at various medical schools in Illinois. Two of the doctors he called on while working at Upjohn for whom he had tremendous respect, Norman Larson, D.O., '35 and Roy Lacey, D.O., '76, both introduced him to osteopathic medicine and encouraged him to consider CCOM. Dr. Wyatt applied to all of the medical schools in Illinois and ultimately accepted the opportunity to attend CCOM.

Even now, decades later, Dr. Wyatt looks back on his CCOM years with great fondness. He says that he "studied like a maniac" because it was hard work, but it was worth it. He remembers his classmates Dr. Philip Watson, Dr. Carl Woodridge, and Dr. Charles Zeller, who shared the same cadaver in anatomy. He reminisces about other dear friends, such as Dr. James Selter, Dr. Ken Blumenthal, Dr. Robert Kovachevich, Dr. Celeste Peterson, and Dr. Robert H. Manoogian. He spoke about some of his favorite faculty, such as Dr. Margaret Dubois, who taught anatomy; Dr. Albert Kelso, who taught physiology; Dr. Wesley Larsen, who taught



*Dr. Lewin Wyatt
with his wife Lillie*

"Once the school affords you the opportunity, I think you are committed to give back."

—Dr. Lewin Wyatt

To learn more, please visit our gift planning website:
midwestern.givingplan.net

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COUNTING THE WAYS TO GIVE AT YEAR-END

Year-end is a season when many are considering special ways to show their support for Northwestern University and other charitable interests. Should you wish to make charitable gifts before the end of the year, you may want to pay attention to what you choose to give and when you choose to give it.

GIVE SECURITIES

If you have owned securities for more than one year, they may be an excellent source for providing charitable support and can bring about welcome tax benefits. Here's why:

- Gifts of appreciated securities such as stocks, bonds, and mutual fund shares are generally deductible at fair market value, regardless of the original cost.
- Capital gains tax that would otherwise be due if the assets were sold can be bypassed if the assets are donated.
- Gifts of appreciated securities can offset tax on up to 30% of your adjusted gross income (AGI).

- Unused deductions can help reduce taxes in up to five future tax years.

CREATE A LIFE INCOME GIFT

Charitable remainder trusts and other special plans allow you to do just that while also satisfying philanthropic goals. You and/or a loved one receive an income for life while you also enjoy a charitable deduction in the year a gift is arranged. This is another way to make charitable gifts that may enable you to itemize your other deductible expenses as well.

ARRANGE GIFTS AS EARLY AS POSSIBLE

In order to enjoy tax benefits for charitable gifts this year, they must be completed no later than December 31. It's best to begin discussing your plans with advisors early to ensure enough time to complete transfers and avoid hasty last-minute decisions. Keep in mind that certain noncash gifts may require additional time. ■

PLEASE JOIN THE HERITAGE CIRCLE



The Heritage Circle recognizes donors who have included Northwestern University in their will or other estate plans such as a trust, gift annuity, or beneficiary designation of their retirement plans, such as IRAs or 401(k) plans, or life insurance policies.

Currently we have nearly 90 Heritage Circle members. Membership entitles you to receive special invitations to donor events as well as mentions—only with your consent—in Northwestern annual reports and publications.

If you are not a member, we would like to invite you to become a member of the Heritage Circle and join this philanthropic group of individuals who are helping ensure the future of Northwestern University. Through your generosity, you can make a difference for Northwestern University students, who will then make a difference in every community where they provide excellent healthcare to their patients.

For more information, please return the enclosed card or contact Staci Glass, Director of Institutional Advancement, at 623.572.3286.

osteopathic manipulative medicine; Dr. Edward Riley, who taught family medicine; and Dr. Solomon Kaufman, who taught otolaryngology.

After graduating from CCOM, Dr. Wyatt completed a one-year internship in family medicine in Flint, Michigan, and then established a solo practice there. Over the course of 30 years, he fulfilled his vision of providing much-needed care for local residents. In addition to his work as a family doctor, Dr. Wyatt was a faculty member at the Michigan State University College of Osteopathic Medicine from 2002 to 2006. He volunteered for several years with the Michigan Osteopathic Association and held various officer positions, including President from 2004 to 2005. After retiring from private practice, the Wyatts moved to Nevada.

Dr. Wyatt believes that there is a special fellowship in the osteopathic medical profession not always found in other professions, and his education at CCOM provided a foundation for him to share that fellowship with his peers and patients. The friendships he established and the influence of his CCOM professors and mentors made a mark on him personally and professionally that endures to this day. For that reason, he hopes giving back to CCOM through his estate will give others the same opportunities and benefits. “I have a heartfelt appreciation for the fact that CCOM gave me a chance to study medicine and had a truly meaningful impact for my family. Once the school affords you the opportunity, I think you are committed to give back.” ■



KEEP THE HOLIDAYS SAFE FOR PETS

*Elizabeth Robbins, D.V.M.,
Midwestern University College
of Veterinary Medicine*

The holiday season is a wonderful time for gathering with friends and family, but can bring stress and even danger for pets. Keep these tips in mind.

- **FOOD FOR THOUGHT.** Keep animals' diets consistent. People treats that can make pets ill include: chocolate, macadamia nuts, xylitol, fatty or spicy foods, onion, garlic, bones, and alcoholic beverages. Keep an eye on your pets around food or drinks and secure trash can lids.
- **OH, CHRISTMAS TREE.** Anchor the tree upright so it won't tip over. Avoid glass ornaments that can break and tinsel, string, or ribbons on trees and packages that can block intestines if swallowed.
- **HOLIDAY PLANTS.** Holly, mistletoe, and lilies can be quite toxic if ingested, while poinsettias can irritate the mouth and esophagus.
- **PARTY TIME.** Party noise, crowds, and extra activity can cause stress and anxiety for pets. Have a quiet area where animals can go to feel safe and escape the noise.
- **WIRES.** Keep wires and batteries out of pets' reach to avoid potentially lethal electric shock or burning of the mouth and esophagus.
- **PET TOYS.** Give pets safe stocking stuffers—indestructible and too big to swallow—or toys that allow you to place healthy treats inside.

Happy Holidays to you and your pets from Midwestern University. ■



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Stephen P. Young, D.O. '75
Phillip C. Zinni III, D.O. '88 and
Gaye Zinni

* Deceased

DO YOU KNOW ABOUT IRA GIFTS?

Do you know you can make gifts directly from your IRA to support Midwestern? If you are age 70½ or older making a gift from your IRA is advantageous because:

- Your gift can count toward the required minimum distribution you must take each year.
- Gifts made directly from your IRA will not be included in your taxable income, helping you avoid being pushed into a higher tax bracket and possibly extra taxation on your Social Security benefits.
- Taxpayers who claim the standard deduction rather than itemizing may also benefit from giving in this way.
- Percentage reductions on deductions and limits on the amount of charitable gifts that may be deductible do not apply to transfers directly from IRAs.
- Most funds held in IRAs will be taxed as ordinary income when withdrawn by your heirs, so making gifts from these funds to tax-exempt charitable organizations, and leaving other assets to your heirs, may be a wise choice.
- You will help support Midwestern University.

To learn more about this unique gift opportunity, please return the enclosed card or contact us. ■



MIDWESTERN UNIVERSITY

Educating Tomorrow's Healthcare Team

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CONTACT US

Staci A. Glass

Director of Institutional Advancement

555 31st Street
Downers Grove, IL 60515

19555 North 59th Avenue
Glendale, AZ 85308

623-572-3286

630-960-3934

sglass@midwestern.edu

www.midwestern.edu