A Message from President Monaco to the Charles Tufts Society

Warm greetings from Tufts University. It is my great pleasure to introduce Beacon, a new publication celebrating all the visionary members of the Charles Tufts Society—a group that includes alumni and friends from every Tufts school, from the classes of the 1930s to recent graduates. Each of you has used gift planning to realize goals and dreams for Tufts and set an invaluable example for others.

Beacon brings you engaging stories from the Tufts community, as well as timely charitable and financial information for...
Charles Tufts Society members and their advisors. Most importantly, *Beacon is here to convey our gratefulness to you.*

As Tufts’ president, I see the impact of gifts like yours every day: talented students thriving through scholarships and student aid. World-class faculty changing the world with incredible teaching, scholarship, and research. Facilities and learning environments that ignite curious and creative minds, fuel innovation and service, and advance the health and well-being of people and animals.

Gift planning is the bridge between this exciting present moment at Tufts and our future. We are honored by your generosity and will steward your gift with the utmost care, in accordance with the trust and confidence you have placed in Tufts.

I hope these pages will provide inspiration and information to further your own unique relationship with Tufts.

Thank you for lighting the way!

*Anthony P. Monaco*
President, Tufts University

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The Charles Tufts Society

“For if Tufts College is to be a source of illumination, as a beacon standing on a hill, where its light cannot be hidden, its influence will naturally work like all light; it will be diffusive.”

—Hosea Ballou, first president of Tufts

The **Charles Tufts Society** honors all those who have included Tufts University in their estate or gift plans. Today, the Charles Tufts Society has more than 1,440 members including alumni, parents, faculty, staff, grateful clients, patrons of the arts, and other members of our community who are passionate about Tufts. Each member and gift has a unique story, yet all are helping to carry forward the tradition of generosity begun by Charles Tufts with his donation of 20 acres of Medford farmland. As a member, you have provided a personal legacy for Tufts—a gift that will light the way for others.

Donors with plans for The Fletcher School of Law and Diplomacy are also welcomed into the Austin B. Fletcher Society.
“When I look at all that I have today, I know I owe everything to Tufts,” says Louis Fiore. “How could I not give back?” Louis and Jean have made giving to the dental school a priority for decades. They have found that their retirement assets, which they have built over their lifetimes, have been a great source for their philanthropic priorities. They have taken advantage of the opportunity to make annual IRA Charitable Rollover gifts, noting that “Because our charitable IRA distribution is not taxed, we have been able to give more to Tufts.” In addition, they have designated the School of Dental Medicine as the ultimate beneficiary of their IRA.

Over the years, they have supported the annual fund, student scholarships, and created Rachel’s Amphitheater, which they established in honor of Louis’s mother who was instrumental in supporting his dreams. At age 12, when he decided to become a dentist, Rachel Fiore set aside some of her hard-earned wages from her carpet mill job. He paid the rest of his way with saxophone gigs and a job at the front desk of his dormitory, Posner Hall. He went on to build a successful dental practice and raise a family with Jean.

Giving News: The IRA Charitable Rollover Is Here to Stay

Many donors, like Louis A. Fiore, D.M.D., D62, and Jean Fiore, have discovered that the IRA Charitable Rollover offers an excellent way to support Tufts today, using IRA assets. This opportunity was introduced by Congress in 2007 and made permanent in 2015—excellent news for nonprofits and donors. The IRA Charitable Rollover allows individuals 70 1/2 and older to give up to $100,000 directly from an IRA to qualifying charitable organizations. The distribution is not counted as taxable income and can satisfy some or all of one’s Required Minimum Distribution. You may use an IRA Charitable Rollover to support the annual fund or another Tufts purpose that has meaning to you. To learn more, visit go.tufts.edu/irarollover.
**STUDENT SPOTLIGHT**

**Benjamin Malley, E18**

**HOMETOWN:** Grosse Pointe Farms, Michigan

**STUDYING:** Chemical Engineering

**ACTIVITIES:** Tufts Financial Group, intramural football, and soccer

**FALLING FOR TUFTS:** While visiting campus, the engineering program and proximity to Boston were draws, but the people he met cinched the deal. “Everyone said they loved it here. They all seemed happy.”

**GOING GREEN:** Inspired by the work of Professor Matthew Panzer to develop clean, sustainable energy solutions, he wants to pursue a career in green energy.

**BRANCHING OUT:** “Before I came to Tufts I was a much more introverted person. Being here, living in a dorm with nine of my closest friends, has made me come out of my shell.”

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**Jim Reed, M.D., M84**

“You never forget the people who helped you,” says Jim Reed. That’s why he maintains close ties to his role model Vivian Pinn, H93, former professor and assistant dean of student affairs. In her honor, he and his classmates established the Vivian W. Pinn, M.D. Scholarship Fund to support underrepresented students. He has named the fund a [beneficiary of his life insurance policy](#) and is including a [bequest](#) for the fund in his will.

Bolstering financial aid is important to Jim because it led to his success as a physician. Weeks into his first year in medical school, Jim discovered his family could not shoulder the burden of tuition. Through the National Health Services Corps, he was assigned to work at the Federal Bureau of Prisons in Oxford, Wisconsin, to offset his educational costs. He ended up working there as medical director for 22 years.

Now retired, Jim serves on the alumni association’s executive council. “I am pleased to help to strengthen the medical school’s efforts to continue attracting a diverse student body,” he says.

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**SCHOLARSHIP:** Jeannie H. Diefenderfer Endowed Scholarship, established by Jeannie H. Diefenderfer, E84, Trustee, Board of Advisor member for the School of Engineering, and Charles Tufts Society member.

**OPPORTUNITIES UNLOCKED:** “The Diefenderfer Scholarship has had a huge impact by making it more affordable and feasible for me to come to Tufts. I am very, very grateful.”

Financial aid is one of the critical areas that many Charles Tufts Society members have chosen to support.
Gift Planning, in Plain English

In each issue of Beacon, we’ll explore a few common terms from the world of gift planning. Some are familiar, like the word “bequest,” which dates to the 14th century, while others may be new.

A **bequest** is a gift made through a will or other estate plan. These popular gifts are simple to create, fully revocable, and create a legacy for Tufts while allowing you to retain your assets during your lifetime. Bequests can specify particular assets, dollar amounts, or percentages and may reduce or eliminate estate taxes.

An **IRA beneficiary designation** is a simple and revocable gift, typically created through the IRA administrator’s Change of Beneficiary Form. By gifting some or all of the remainder of your retirement plan to Tufts, you may be able to reserve less heavily taxed assets for heirs and maximize your charitable giving.

**Life insurance** can be a wonderful asset to give yet is often overlooked. Donors may designate Tufts as a beneficiary of part or all of the policy’s death benefit, or give the policy outright and qualify for an immediate charitable income tax deduction.

Contact Us:
Gift Planning Office
Phone: 888-748-8387
Fax: 617-627-4425
Email: giftplanning@tufts.edu

**The Fletcher School of Law and Diplomacy**
Brooke Anderson
Senior Director

**School of Arts and Sciences,**
**SMFA at Tufts,** and the **Friedman School of Nutrition Science and Policy**
Samuel Sanker
Senior Associate Director

**School of Engineering and Cummings School of Veterinary Medicine**
Doug Nannene
Associate Director

**School of Medicine and School of Dental Medicine**
Laura H. Parker
Associate Director

Yvette Story
Associate Director of Trusts and Estates

Paula Brooks
Administrative Assistant

Tyeisha Turner
Gift Planning Coordinator

SAVE THE DATE
FOR THE CHARLES TUFTS SOCIETY AND SCHOLARSHIP DONORS LUNCHEON, MAY 18, 2017

We hope you will be able to join us for this special, annual luncheon hosted by President Monaco at his home on our Medford campus.