Educating Future Generations

At the age of 90, Harry S. Jonas, M.D. has seen many changes in the practice of medicine and medical education over the years. One important constant for Dr. Jonas since the beginning of his academic and medical career has been ACOG.

“My involvement with the College started at the local level, followed by the state and district levels. I was on the board and then served a term as National President,” recalled Dr. Jonas.

“ACOG is such a wonderful organization to educate medical students, residents and practicing doctors. The College hosts excellent scientific conferences that have always been important to me.”

After serving in the Navy at the end of WWII, Dr. Jonas attended Washington University in St. Louis where he completed his undergraduate and medical degrees and performed his residency. Dr. Jonas was then invited to join a private practice in Independence, Missouri.

President Harry Truman, a family acquaintance and citizen of Independence, even wrote Dr. Jonas’s father a letter (a copy of which is in the Harry S. Truman Presidential Library and Museum) encouraging Dr. Jonas to come to Independence. Dr. Jonas later spearheaded fundraising efforts for the Truman statue that sits outside the Jackson County courthouse.

Dr. Jonas enjoyed his many years in private practice. “When I’m asked how many babies I delivered, my answer is ‘zero;’ it’s the mothers who delivered them. I was, however, in the delivery room for the birth of 7,000 babies.” Missing the academic environment during private practice, he also spent time teaching obstetrician-gynecologist residents in the late 1950s at one of the two public hospitals in Kansas City. “Even though it was an unpaid faculty position, I enjoyed teaching and learned so much from it.”

By 1970, the University of Missouri had established a new medical school in Kansas City and, after leaving private practice, Dr. Jonas became its first OBGYN Department chair. Later, he was named dean of the medical school and served for 10 years. “One of the most gratifying aspects of being dean was presenting the students with their medical degrees.”

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Do I Need a Will?

No matter your age, personal circumstances or financial obligations, everyone needs a will. An up-to-date will is an effective way to organize your affairs and remember those you care about most.

If you are unmarried

Many adults who aren’t married or who have lost a spouse may think a will is not necessary because no one depends on them for support. But when an unmarried person fails to leave a will, confusion can abound.

Without a valid will or other estate plans, state laws that may or may not express your wishes take effect. Assets cannot pass outside the family or to charitable interests.

Have things changed?

Was your will written when you were a young adult or when you were middle aged? Have things in your life changed since then? If so, now may be a good time to revise your will and other plans.

If you are like most people, you own assets and have people and causes in your life whom you care about.

Making a will allows you to protect them all. By planning for the future distribution of your property, you can create peace of mind for yourself and your loved ones.

Bequest Language

If you are considering a bequest to ACOG, here is some suggested wording to take to your attorney:

“Aafter fulfilling all other specific provisions, I give, devise and bequeath _____% of the remainder [or $________] of my estate to the ACOG Foundation, a charitable corporation [Tax ID #362217981] currently having offices at 409 12th Street SW, Washington, DC 20024.”
As Easy as 1, 2, 3

Once you've decided to enjoy the peace of mind that comes from writing your will and making other estate plans, how do you begin? It's easy—taking the first step is the hardest part.

1. **Make an appointment with your attorney.** If you don't have an attorney, call your local bar association for recommendations. Or ask trusted friends and/or advisors for names of lawyers they know who specialize in estate planning in your state. There is no substitute for the professional expertise of a competent attorney.

2. **How much will it cost?** Most estate plans cost less than the legal fees you probably paid the last time you bought a home. Your attorney will estimate the charges before you begin the will planning process.

3. **Make these lists to bring to your attorney:**
   - All property you own and its value, including stocks, personal property, real estate, retirement plans, etc.
   - The original cost of each property, if you have that information.
   - How your assets are owned (outright, joint ownership, etc.).
   - Names and ages of all immediate family members and their relationship to you.
   - Your wishes for distributing your property, including any charitable gifts you may wish to make.

Taking these steps will make the process of making or revising your plans simpler, faster and ultimately more rewarding and can lessen the emotional and financial cost of not having a will. If we can provide more information or help with the charitable aspects of your plans, please return the enclosed card or contact Kathleen Kenny at 202-863-2479.

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He then took a position on the visiting faculty at Northwestern University in Chicago and became co-chair of the Liaison Committee on Medical Education (LCME), the entity that provides accreditation for medical schools. The LCME is sponsored by two organizations: the American Medical Association (AMA) and the Association of American Medical Colleges (AAMC). During his 13 years with LCME, Dr. Jonas visited each of the 127 medical schools in the U.S. and several in Canada.

Perhaps the most important constant in Dr. Jonas's life has been his beloved wife Connie, who sadly passed away in 2010. “We were married for 61 years, and had known one another since first grade,” he shared. Connie trained in journalism and was an active community volunteer throughout her lifetime while raising their three children, Hank, Bill and Sarah. She was a talented writer and devoted grandmother to their six grandchildren.

“Connie was so supportive of my career. She was very involved when I was President of ACOG. We enjoyed traveling all over the United States and the world in that capacity,” Dr. Jonas said.

When he was recently updating his estate plans, Dr. Jonas included a gift in his will to ACOG to create The Connie and Harry Jonas, MD Clinical Seminar. Focusing on perinatal care, this seminar is held at the ACOG annual meeting (of which he has missed only one over the years).

“The College has meant so much to me personally and professionally,” said Dr. Jonas. “With the ongoing changes in medicine, both in practice and research, providing educational opportunities to our members is critical.”

Legacy gifts to ACOG ensure we can continue to offer education, advocacy and practice management to our members.
Test Your Knowledge About Beneficiary Designations

Do you have life insurance policies or retirement plan accounts? Along with bank and investment accounts, life insurance and retirement plans can make up a significant portion of our overall estate.

Unlike many assets, however, your retirement, bank account and life insurance assets may be distributed quite simply: through a beneficiary designation form filled out when the plan or account is created (or updated at a later date). Take the following True/False quiz to see how much you know about beneficiary designations.

It’s a good idea to conduct a yearly review of all my beneficiary designations to make sure they are still current. T ❑ F ❑

TRUE. Events in your life, such as a change in marital status, the birth of grandchildren, moving to another state, the loss of a loved one, changes in your charitable wishes, etc., can affect one or more of your current beneficiary designations. Making sure they still reflect your intentions is important.

It’s a simple process to make a change or an addition to a beneficiary designation. T ❑ F ❑

TRUE. It may be as easy as going online to make the change electronically or filling out and signing a basic form and mailing it to the institution (insurance company, retirement plan administrator or financial entity). Contact your plan or account administrator for more information.

I can list multiple beneficiaries to receive these assets. T ❑ F ❑

TRUE. Many choose to leave their spouse or other loved ones these assets. However, there may be certain tax implications for your heirs. You may want to consider using one or more of these accounts to make your charitable gifts and use other assets to provide for your family.

I can name a charity as a beneficiary on a retirement plan, insurance policy, bank account or investment account. T ❑ F ❑

TRUE. You can generally name a charity to receive all or a portion, such as a percentage, of one of these accounts.* If you choose to do so, it is important to make sure you have the proper legal name of the charity to ensure the assets go where you want them to. If we can provide more information, please return the enclosed card or contact us.

*Special rules apply to some “pay on death” provisions in some states. Check with your advisors if you have questions about updating beneficiary designations.

Tax-free Giving

If you are 70½ or older, consider making a gift to ACOG from your IRA. You can make tax-free gifts up to $100,000 per person, per year ($200,000 for couples). By giving directly from your IRA, you won’t increase your adjusted gross income and possibly subject your Social Security income to a higher level of taxation. Another advantage: you offset your required minimum distribution and avoid taxes on the extra income.

MORE INFORMATION

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