THE HERITAGE SOCIETY

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Upcoming Events:
21st Annual UMass Cancer Walk and Run
Sunday, September 29, 2019
UMass Medical School/UMass Memorial
5 Lake Avenue North
Worcester, MA

11th Annual Winter Ball
Friday, December 6, 2019
Mechanic's Hall
Worcester, MA
www.umassmed.edu/winterball

Funding Research to Honor 60 Years of Life Together

Widower supported Parkinson’s disease research at UMass Medical School

It was Parkinson’s disease that took her. So, after her death, her husband decided to fight back against the devastating neurological disease.

Rita Martel, who passed at age 87 in 2015, left a loving legacy of family and community impact. In the wake of her loss, Rita’s husband of 60 years, Maurice (Marty) Martel, DDS—a well-known dentist, veteran and civic leader in Central Massachusetts—knew what he wanted to do. There was nothing available in current medical technology to save Rita from the grip of Parkinson’s. But Marty knew research could help others maintain hope.

“There’s not a vaccine or anything available today to change the course of Parkinson’s, only medication to help manage symptoms, which can be hard to figure out,” Dr. Martel said in a story first published in 2017. “With the research they’re doing at UMass Medical School—not just in the lab but at the bedside—I’m confident that eventually we’ll see a solution.”

Dr. Martel passed away on June 9, 2019, at the age of 89, yet the research program he helped fund continues. Immediately following Rita’s death, Dr. Martel and his family requested that memorial gifts made in her name go to Parkinson’s research at UMMS. When he learned the following year that he could transfer some of his retirement savings there as well, Dr. Martel decided to increase his personal support.

“My accountant informed me that I could direct up to $100,000 of my IRA each year—tax-free—to a charitable organization,” Dr. Martel said at the time.

This type of distribution may be excluded from the IRA owner’s income, resulting in lower taxable income. “I’d been self-employed all my professional life and had a traditional IRA,” he said. Rita was a caregiver herself and financially astute. She had supported Marty through dental school at Northwestern University with her work as a physical/occupational therapist. It was her idea to establish the IRA when Dr. Martel set up his dental practice in Holden, Mass.

“We were both oriented to frugality, so I regularly put money toward my retirement,” said Dr. Martel, whose father had also been a member of the faculty at Tufts University School of Dental Medicine. “Through the magic of compounding interest, it worked out very well.”

In September 2016, Dr. Martel met with several UMass Medical School scientists—including Robert H. Brown, Jr., director of the Harvard Parkinson’s Disease Center and Thomas G. Perry, MD, chief of UMass Memorial’s Department of Neurology. “I was confident that eventually we’d see a solution,” he said.

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Continued on page 3

Summer 2019
A Conversation with Carolyn: Taking Charge of Your Legacy
We live in the “selfie” age. Smartphone users worldwide take photographs of themselves, their food, their pets. While selfies capture a moment in time, legacies reflect a lifetime of experiences, knowledge and know-how. A legacy is what we leave behind. What we do, how we live, the decisions we make—all shape our legacy and influence how others will remember us. Carolyn Flynn, Director of Gift Planning at the UMass Foundation, addresses questions you may have about shaping your legacy and making a difference for others.

Q: Why are wills and living trusts important? Wills and living trusts are estate planning documents used to pass assets on to beneficiaries. When it is time to settle your estate, a will is required. A living trust, on the other hand, is a trust that is set up to hold assets during the grantor’s lifetime. At the grantor’s death, the assets held in the trust are transferred to named beneficiaries. Without a valid will or living trust, your assets will be distributed according to a fixed, statutory formula.

Q: What is the difference between a will and a living trust? Wills and living trusts provide a tried and true foundation for planning how your assets will be distributed when you die. But another important feature is their flexibility. Since your goals and needs will inevitably change as time passes, the flexibility inherent in these legal documents means you can revise or update your will or living trust throughout your lifetime. This provides important assurance that you can meet unexpected needs, address changing goals, and take advantage of opportunities to increase your philanthropic impact.

Q: Could you tell me more about the benefits of an up-to-date will or living trust? Taking the time to plan a will or living trust and keeping these documents current provides distinct benefits to you, including the satisfaction of knowing your goals have been addressed and the peace of mind that comes from providing for loved ones. Your family members and close friends—those dearest to you—also appreciate your generosity.

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By phone by email

We have already included UMass Medical School/UMass Memorial in our estate plans.

Are you 70½ and over?

Tell me about making a gift from my IRA.

NAME

ADDRESS

CITY

STATE, ZIP

TELEPHONE

EMAIL

To mail, please tear off at the perforation, fold this panel to the inside, and tape securely closed.

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HERITAGE
SOCIETY
NEWSLETTER

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Maurice (Marty) Martel, DDS, UMMS planned giving donor

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