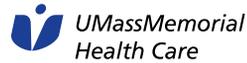


HERITAGE SOCIETY



NEWSLETTER

Funding Research to Honor 60 Years of Life Together

Widower supported Parkinson's disease research at UMass Medical School

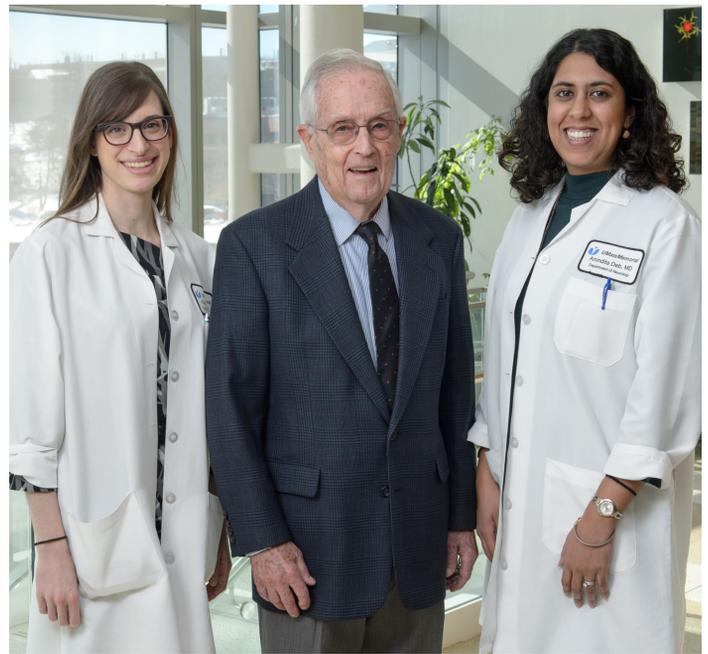
It was Parkinson's disease that took her. So, after her death, her husband decided to fight back against the devastating neurological disease.

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.



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

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, who 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 UMMS scientists—including Robert H. Brown

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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. Although a living trust can also serve a variety of purposes during life, for estate settlement purposes, either a properly drafted will or living trust is a dependable way to make sure your wishes are ultimately carried out. Because of the critical importance of meeting legal requirements, your attorney should draft or update your will or living trust. Without a valid will or living trust, laws of intestacy prevail and the state where you reside distributes your assets according to a fixed, statutory formula.

Q: What is the difference between a will and a living trust?

When it is time to settle your estate, a will is submitted to probate court. The process of verifying the authenticity of a will is a matter of public record, which means there is virtually no privacy regarding the distribution of assets. For this reason, you may prefer to use a living trust rather than a will in your estate planning. A living

trust provides more privacy at death because it avoids the probate process. The drawback, when compared to a will, is that living trusts are more expensive to administer since they are more complex and may require more dutiful attention over a lifetime. Your attorney can help you decide which is best—many planners use a combination of these two versatile planning tools.

Q: Can I change the provisions of my will or living trust?

Yes, you can. Both 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 up to date 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 that your goals and intentions will be carried out. There is no need for them to speculate about your preferences or desires, because your will or living trust serves as a dependable road map that adds to your legacy of caring.

Q: How can I help support UMass Medical School and UMass Memorial?

UMMS can also benefit from your planning. A gift in your will or living trust helps us serve students, enrich programs, and produce gifted graduates who impact communities for generations to come. You can direct support to a specific program

or department, or you can leave your gift unrestricted and we will use your gift to meet pressing priorities.

Q: What are some of the ways to make a gift?

You can provide a specific amount or specific property to UMMS, or allocate a percentage of your estate to be distributed to us. You can also designate that UMMS receives the residue of your estate—“what is left” after all other obligations have been met.

Q: How do gifts to an endowment fund work?

When a gift is made to our endowment fund (or when a gift is made to create an endowed fund), only the earnings from the fund are used to support our work. An endowment fund is designed to last perpetually, providing annual gifts for a specific purpose year after year.

*Please contact Carolyn at 617-287-4092 or cflynn@umassp.edu for more information. Be sure to request our complimentary brochure, *Steps to an Effective Will or Living Trust*.*

An Easy Way to Give (continued from page 1)

Jr., DPhil, MD, the *Leo P. and Theresa M. LaChance Chair in Medical Research*, and chair and professor of neurology—who presented him with a proposal for funding a movement disorders fellowship.

“There are still so many unknowns in this neurological disease,” said Dr. Martel. “There are similarities to ALS—Lou Gehrig’s disease—and there’s a lot of ALS research at UMass Medical School under Dr. Brown, which is encouraging.”

After meeting with Dr. Brown and other physicians and scientists at UMMS, and considering his options, Dr. Martel decided to direct \$100,000 of his IRA to establish the Rita M. Martel Fellowship in Parkinson’s Disease.

“Based on my interest in biomedical research, how Parkinson’s disease affected Rita and having a very successful financial plan, I couldn’t think of a better place to direct that money than to UMass Medical School.”

The first Rita M. Martel Fellow was named in December of 2018. Dr. Anas Hannoun, a senior resident in neurology at UMMS, was selected for the fellowship. He went on to conduct clinical research on the impact the most common Parkinson’s medication, levodopa, has on the bacteria living in the patient’s gut, also called the microbiome. That study evaluated the

microbiome before and after initiating levodopa in recently diagnosed Parkinson’s patients from UMass Memorial and other clinics.

“Research conducted by the first Martel fellow, Dr. Anas Hannoun, helped us further understand Parkinson’s disease as well as enhance treatment and patient care,” Dr. Brown said in a letter to Marty prior to his passing. “Your generosity will help to advance innovative research in ways that will benefit countless Parkinson’s patients in the years to come.”

Even at his advanced age, Dr. Martel’s passing was somewhat unexpected. At 89 he had remained vital and active in many areas of his personal and public life—playing golf and tennis well into his 80s, his family reported. Dr. Martel also continued his support of research at UMMS, with an additional donation of nearly \$90,000 in the two years before his passing. Recruiting is now underway for the next Martel Fellow.

“I’m pleased to do this in Rita’s memory,” Dr. Martel said at the time. “I hope it will inspire others to support Parkinson’s research, too.”

If you would like to learn more about making a planned gift to UMass Medical School and/or UMass Memorial, please contact the Office of Advancement at giving@umassmed.edu or 508-856-5520.

Office of Gift Planning
333 South Street
Shrewsbury, MA 01545

Upcoming Events:

21st Annual UMass Cancer Walk and Run

Sunday, September 22, 2019

UMass Medical School/UMass Memorial
55 Lake Avenue North
Worcester, MA

www.umassmed.edu/cancerwalk

11th Annual Winter Ball

Friday, December 6, 2019

Mechanics Hall
Worcester, MA

www.umassmed.edu/winterball



Become a Member of the Heritage Society

The Heritage Society was established to recognize donors to UMass Medical School and UMass Memorial Health Care through bequests, retirement plans, life-income gifts, life insurance policies and other estate intentions.

If you have provided for UMass Medical School/UMass Memorial Health Care in your estate plan, please let us know! We would like the opportunity to thank you and recognize you as a member of the Heritage Society. For more information, please fill out the attached reply card or contact: **Carolyn J. Flynn, Director of Gift Planning**, at cflynn@umassp.edu or 617-287-4092.

HERITAGE SOCIETY MEMBERS

Couples with different last names are listed alphabetically according to the second name, e.g., Jane Doe and John Smith will be listed by Smith.

Anonymous (2)

Helle Alpert, PhD, and Joseph S. Alpert, MD

Lori J. Barker, MS'94, RN, and Richard Barker

Rebecca Begin and Gregory B. Begin, MD'78 F'82

Norman E. Beisaw, MD

Stanley I. Berman

Jennifer H. Caskey, MD'75

Kathryn Christo, RN, BSN

Nancy Sheard and Nathaniel G. Clark, MD'88

Louise Lehtola-Clarke and Jeffrey Clarke

Patricia and Joseph Cote

James Dalen, MD

Sarah and Dix Davis P'03

Bonnie Allen and David DeChristopher

Mary Ellen G. Foti, MD'83, and Lawrence Foti

Phoebe Ann Freeman

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Susan Mae Gonsalves

Rosalie and David Grenon

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Duddie Massad*

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Kenneth J. Miller, MD'77 R'80

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Nilima A. Patwardhan, MD R'78, and

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Mr. and Mrs. Jon R. Shakour

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Michelle and Prescott Stewart

Beverly and Fred Stone

Mary M. Tse, MD'77

James R. Waldron

Richard Weingarten

Betty Wheeler

Susan B. and David K. Woodbury

Sandra and Robert Zykofsky

* deceased



SHAPE YOUR LEGACY, SHAPE OUR FUTURE

Your Gift Matters

- Please send me your free brochure, *Steps to an Effective Will or Trust*.
- I am interested in learning more about the Heritage Society. Please send information.
- I am interested in discussing other ways to support UMass Medical School/UMass Memorial. Please contact me.
 - by phone
 - by email
- I/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

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STATE, ZIP

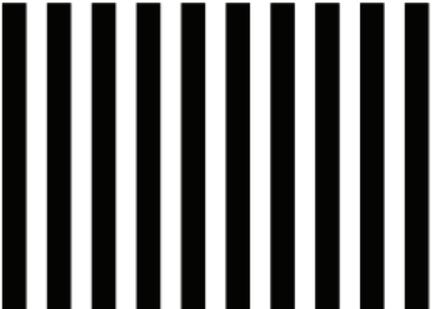
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UMass Medical School students line up for the annual White Coat Ceremony.