PLANTING THE SEED

INDIANA UNIVERSITY SCHOOL OF MEDICINE
GROWING THROUGH ENDOWMENTS
“He that plants trees loves others besides himself.”

THOMAS FULLER
PLANTING THE SEED

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GROWING THROUGH ENDOWMENTS
In many ways, an endowment is like a tree.

It starts with a seed, develops roots and continues to grow.

Eventually, it becomes an impressive, sturdy entity that can weather time and elements.

Like a tree, an endowment outlives those who planted it, bringing joy for years to come.
Each new investigation launched by our physicians and scientists is a seed of hope. If the conditions are right, and it is carefully cultivated, that seed may grow into a new treatment for diabetes, cancer, Alzheimer’s and myriad other diseases.

We also are sowing seeds within each of our medical students. Our lessons about compassion and quality germinate within them, helping these young men and women develop into the kinds of physicians we want caring for ourselves and our loved ones.

You, too, can plant a seed that benefits medical care in Indiana and around the world.

By giving to the Indiana University School of Medicine in the form of an endowed gift, you can enable a scientist to pursue a promising area of research or help a student realize the dream of medical education. Whatever program you choose to support, your endowment will live on forever—ensuring the seed you plant will flourish and bear fruit.
An endowment is a permanent fund established to benefit the Indiana University School of Medicine. Rather than spend your gift outright, the Indiana University Foundation invests it. Each year, a portion of the investment earnings is allocated to support research or educational activities, and the remaining income is reinvested. Your original gift—the principal—remains untouched, and it continues to earn interest. As a result, your endowment lives on forever. The endowment may be established in your name or in honor of a family member, physician, mentor or someone else important to you. The fund will bear the name you designate in perpetuity, creating a lasting legacy.
Endowments may fund scholarships for worthy medical students or research related to a disease that has touched your family. They may support outreach initiatives such as our internationally recognized work in Kenya or student outreach clinics that provide free care to disadvantaged patients. They may benefit a specific department or be directed to any one of our nine campuses throughout Indiana. The choice is yours. Whatever your area of interest, the School of Medicine will help you establish an endowment that accomplishes your philanthropic goals.

**WHY ARE ENDOWMENTS IMPORTANT?**

Though we are a public medical school, the state only funds about 10 percent of our operating costs. At the same time, funding from the National Institutes of Health and other sources is scarce.

Philanthropic support is absolutely vital if we are to train expert physicians and continue to improve care for cancer, dementia, diabetes, and other devastating diseases.

While all gifts are important and appreciated, endowed gifts are especially crucial. They provide an ongoing, stable source of income for the School of Medicine, ensuring we have adequate resources today, tomorrow and far into the future.

**CAN I DESIGNATE HOW MY ENDOWMENT WILL BE USED?**

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Endowed gifts are invested by the Indiana University Foundation. Thanks to the Foundation’s diversified portfolio and successful investment strategies, your endowed fund will grow and provide significant support for the IU School of Medicine.

The Ruth C. Holton Chair in Otology provides a telling illustration. The fund was established in 1998 with an initial gift of slightly more than $1.5 million. As of 2016, it had generated an additional $1.5 million in income to support research and education related to hearing and the workings of the ear. With support from the fund, the current holder, Eri Hashino, Ph.D., has made critical discoveries that may be part of the foundation that helps scientists stop or reverse hearing loss.
There are several types of endowments that may be established at the IU School of Medicine. Regardless of how you choose to direct your gift, you can be certain that it will bear fruit and have a positive impact in Indiana and beyond.

**ENDOWED CHAIRS**
**ENDOWED PROFESSORSHIPS**
**ENDOWED SCHOLAR/INVESTIGATOR PROFESSORSHIPS**
**ENDOWED FELLOWSHIPS**
**ENDOWED SCHOLARSHIPS**
**ENDOWED LECTURESHIPS**
**ENDOWED RESEARCH FUNDS**
A MESSAGE FROM THE DEAN

At their core, endowments are about people and their stories.

In the pages that follow, you will be introduced to some of the faculty members and students at the Indiana University School of Medicine who have benefited from endowments. They are curious, compassionate individuals who each have their own story about what motivates them—the death of a loved one, a summer spent working alongside children with disabilities, a desire to improve care for the impoverished and underserved.

Likewise, donors who establish endowments carry with them unique life stories that inspire their generosity. Some wish to fight back against a disease that has caused them to suffer. Others seek to celebrate the memory of someone dear to them, or pave the way for a young person beginning a career in medicine.

Endowments unite these people and enable them to write the next chapter of their stories together. Collectively, they produce tales of discovery, healing and hope. And because these funds will endure for all time, endowments ensure our stories continue to be retold for generations to come.

Thank you for considering contributing to our story at the Indiana University School of Medicine through the establishment of an endowment.

Sincerely yours,

Jay L. Hess, M.D., Ph.D., M.H.S.A.
Dean
As a college student, Dr. Wade Clapp worked at a summer camp for children with ADHD, autism, and other conditions often associated with academic struggles. “We did a lot of kids a lot of good at that program,” he says. “Kids would go back and improve in school.”

That ability to help change the trajectory of a child’s life sparked his interest in medicine—specifically pediatrics. Today, Dr. Clapp is the chairman of the Department of Pediatrics at IU School of Medicine, physician-in-chief at Riley Hospital for Children at Indiana University Health, and a nationally recognized researcher focused on NF1, a common and often devastating genetic disorder.

Dr. Clapp holds the Richard L. Schreiner Chair in Pediatrics. Funding from that endowment and others is vital because it allows him to recruit faculty and support innovators who are asking new scientific questions. Under his leadership, the department has grown into a research powerhouse, and it trains roughly 165 future pediatricians each year through its highly respected residency and fellowship programs.

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In his role at IU, Dr. Clapp is influencing the lives of children throughout Indiana, but his basic goals remain similar to those he held as a camp counselor decades ago: “We want to empower children to be prepared for a life of success and good health.”
Legend has it that in thirteenth-century Italy, before the formal establishment of universities, teachers would stand in streets and parks for hours, espousing their beliefs about the world, philosophy and science. If a lecturer were especially inspiring, those gathered in the crowd would pitch in coins to purchase a chair, making it more comfortable for him to continue. Receiving a chair was a great honor and a symbol of success as a professor.

Today, that chair is symbolic, awarded to exceptional faculty members to support their academic pursuits.

THE LEGEND OF THE CHAIR

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Dr. Michael Koch holds the John P. Donohue Chair in Urology, named in honor of the late IU urologist who was a pioneer in the field. Dr. Koch pursued urology as a specialty, in part, because he lost his own father to kidney cancer while still in medical school, and he wanted to help others facing a similar diagnosis.

Under Dr. Koch’s leadership as chairman, the IU urology program has consistently been ranked among the top in the country. But no ranking or accolade means as much as his relationship with patients. “There are people I have been taking care of since before I had kids or grandkids, since before I had gray hair,” he says. “They become part of your life.” It’s that genuine concern for patients that drives his commitment to research.

He views endowed chairs as pivotal because they give him the flexibility to recruit bright scientists and surgeons, and to ensure they have the resources needed to develop innovations that save and extend lives. “I want IU to be known as a place that offers treatments that can’t be done elsewhere and to provide the highest level of urologic care in the country,” he says. It’s a goal that would make his father proud.
Neurologist Karen Roos often enters people’s lives during some of their most trying moments, when their bodies and minds are betraying them and the future is a blur of uncertainty. And yet she can’t imagine doing anything else.

“A big part of being a good doctor is taking the journey with the patient,” says Dr. Roos, the John and Nancy Nelson Professor of Neurology. “People didn’t plan to have a disease. It can be life modifying, it can be disabling. I think the most comforting thing is to say to a patient, ‘I’ll stay on this journey with you wherever it takes you.’”

Among those she has walked alongside is Carol Breese. Carol suffered rapid memory loss and was diagnosed with dementia. By the time she reached Dr. Roos for a second opinion, she had lost the ability to speak and write, and she didn’t recognize her family. She was on a rapid descent that seemed destined to end in death.

An expert in neurological infectious disease, Dr. Roos determined Carol had autoimmune encephalitis, and the infection was destroying her brain. By acting quickly, Dr. Roos was able to save her. Carol lived many years after her treatment and had a chance to be part of her grandchildren’s lives—a goal that kept her motivated during her long and arduous recovery. Along the way, doctor and patient developed a close bond.

“When I’m taking care of patients I’m really alive,” Dr. Roos says. “It’s a privilege. It’s a joy.”

ENDOWED PROFESSORSHIPS

Like an endowed chair, an endowed professorship supports the work of a top-flight faculty member and provides the holder with a continuous stream of funding to pursue research and scholarly activities. Named professorships strengthen the IU School of Medicine and lead to improved patient care by enabling the recruitment of leading physicians and scientists.

Giving level: $1 million or more

KAREN L. ROOS, M.D.

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ENDOWED SCHOLAR/INVESTIGATOR PROFESSORSHIPS

Endowed scholar/investigator professorships are intended to support faculty members during the early, critical stages of their careers, when outside funding is especially challenging to secure. Income from the endowment provides an up-and-coming leader with start-up funding necessary to launch and nurture a successful research program. In a few years, when the faculty member is on firm footing, the endowed fund shifts to support another assistant- or associate-level professor who is developing a research career.

Endowed scholar/investigator professorships are a meaningful way to invest in future leaders in research and patient care.

Giving level: $500,000 or more

BROWNSYNE TUCKER EDMONDS, M.D., M.P.H., M.S.

Dr. Brownsyne Tucker Edmonds is still in the early stages of her career, but she is already tackling big and weighty issues. An obstetrician and gynecologist, she is focused on improving care for underserved populations of women.

“Caring for women, social justice, health disparities—these are the things that keep me up at night and keep me going during the day,” says Dr. Tucker Edmonds, a rising star who joined the IU School of Medicine faculty in 2011. “All of the research questions I ask, at their core, have been about race, class, culture, and about how those issues impact health.”

Her ultimate goal is to develop research-based approaches to help physicians communicate more effectively with patients of different cultural, economic and educational backgrounds, and to empower patients to make the best decisions for themselves. Up-and-coming faculty leaders like Dr. Tucker Edmonds would benefit tremendously from philanthropy. “This is a really important series of questions, but if you can’t find funding, you can’t do the work,” she says. “Endowments create a level of scholarly freedom. They let you explore things a little outside of the box or ahead of the times.”
When Dr. Chris Bailey’s friends and colleagues sought to honor him, they thought about his career as a cardiologist and how he might want to be remembered. The answer seemed obvious: In addition to being an exceptional physician, he was a mentor and an educator who cared deeply about training the next generation of heart specialists. Fittingly, an endowed fellowship was established in his name to ensure the IU School of Medicine would continue to be home to a world-class cardiology training program.

The fund supports physicians like Dr. Julie Clary, the inaugural John C. Bailey Cardiology Fellow. Dr. Peng-Sheng Chen, chief of the Krannert Institute of Cardiology and the Medtronic Zipes Professor of Cardiology, notes that the cost of preparing young physicians continues to increase. Endowed fellowships ensure the School of Medicine has the resources to train enough specialists in each field, and to provide those trainees with the broad range of opportunities necessary to excel in their careers. “Many of our fellows ultimately choose to practice in Indiana, so gifts to establish endowed fellowships benefit people in every part of the state,” Dr. Chen says.

Dr. Clary is the perfect example. After completing her fellowship training, she joined the faculty of the IU School of Medicine. In addition to improving the lives of her patients, she hopes to mentor future cardiologists, just as Dr. Bailey and others did for her. “I don’t know how anyone would want to do anything else,” she says of being a cardiologist. “When you connect with patients, when they realize you understand them, when you alleviate some of their fear and you’re able to help them, that’s when you realize you’re doing something good.”
Dr. Sunetris Fluellen (far left) was the first member of her family to go to college, and she determined she would not squander the opportunity. She could think of no more meaningful career choice—and no better way to make her family proud—than to become a doctor. She was helped along the way by several scholarships, including the endowed Dr. James B. and Marie Schutt Memorial Scholarship, named in honor of a class of 1931 alumnus and his wife. Established in 1998 through an estate gift, the scholarship has thus far provided financial support to 65 deserving students, and it will live on in perpetuity. “My scholarship allowed me to focus more on medical school and less on financial stressors,” Dr. Fluellen says.

A graduate of the class of 2016, Dr. Fluellen is now pursuing her dream of becoming an OB/GYN. She vividly recalls one of the first births she witnessed as a medical student. “It was their first child,” she says. “The father burst into tears, the mom burst into tears. To be part of that experience made me realize why I am here.”

(Also pictured are scholarship recipients Joseph Ladowski, an M.D./Ph.D. student, and Madhavi Singhal, a 2014 alumna of the IU School of Medicine.)

ENDEOURED SCHOLARSHIPS

On average, School of Medicine students borrow more than $180,000 to finance their medical education, making scholarship support more important than ever. Endowed scholarships help attract bright and talented students to the School of Medicine and give young physicians the freedom to choose a career based upon interest and social need, rather than on their ability to pay back debt. You will have the added satisfaction of knowing that your gift helps each patient those students go on to care for.

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<th>Giving level</th>
<th>Endowed Scholarship</th>
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ENDOWED LECTURESHIPS

Funding for lectureships enables the School of Medicine to invite prominent physicians and researchers from other institutions to share their expertise with faculty, students, residents and fellows. Visiting lecturers typically participate in scholarly activities for one to three days. By endowuing a lectureship in the department or specialty of your choice, you can ensure that those affiliated with the IU School of Medicine regularly have access to individuals who have made important discoveries or who are exploring new, innovative ideas. Such collaboration will breed further success at Indiana University.

Giving level: $100,000 or more
Dr. Bruce Lamb has dedicated his career to Alzheimer’s disease, and the veteran researcher knows all too well the devastating toll it takes on patients, families and society. More than 5 million Americans suffer from Alzheimer’s, and that number is expected to increase threefold by mid-century. “A cure is the ultimate goal,” says Dr. Lamb, who holds the Roberts Family Chair in Alzheimer’s Disease Research. “But in the meantime we have to do something, and the sooner we do it the better. This is a crisis we have to solve.”

He believes there is real reason for optimism. Thanks to research breakthroughs, experts now suspect that the disease begins decades before memory loss and other symptoms arise—providing a window for earlier intervention. At the same time, scientists are aggressively exploring genetic, environmental and other factors that nurture development of the disease.

Dr. Lambviews endowed research funds as essential to attracting top researchers to IU and to making progress. “An endowment says there is a real commitment—from leadership, from donors—and that commitment is into the future. It says we plan to be a leader in the field.”
GIFTS OF RETIREMENT PLAN BENEFITS
Like many Americans, you may have tucked a substantial sum of money away in an IRA, 401(k) or other retirement plan. If you find you don’t need that money to pay living expenses as you age, you may wish to consider gifting a portion to benefit the Indiana University School of Medicine to establish an endowment. The popular IRA charitable rollover provision allows individuals who are at least age 70½ to make a charitable gift of up to $100,000 annually directly from their IRA. Alternatively, you may consider naming the IU School of Medicine as the beneficiary of a retirement account and leaving other, more tax-favored assets to your loved ones.

To learn more about how you can help grow the Indiana University School of Medicine through endowments, please contact:

Indiana University School of Medicine
Office of Gift Development
1110 W. Michigan Street, LO 506
Indianapolis, Indiana 46202
317.274.3270 or 800.643.6975
www.medicine.iu.edu/give

Fundraising Disclosures: go.iu.edu/89n

HOW DO I ESTABLISH AN ENDOWMENT?
There are many ways to establish an endowment. In all cases, you may make a single gift or fund an endowment over a number of years using any combination of the following options:

GIFTS OF ASSETS
The simplest way to establish an endowment is through cash gifts. But creative gifts of assets can include stocks, bonds and property. These gifts may provide you with charitable deductions and additional tax savings.

GIFTS BY WILL
You may also establish an endowment through various types of bequests. In doing so, you may secure a charitable estate tax deduction for the value of your planned gift.

GIFTS THAT PAY YOU INCOME
Do you want to establish an endowment but worry about having enough income for yourself and your loved ones? Life-income gifts, such as gift annuities and charitable remainder trusts, can provide you with a regular income stream, significant tax savings, and the satisfaction of supplying the IU School of Medicine with much-needed resources.

THE CHARITABLE LEAD TRUST
Donors who are concerned about exposure to the federal estate tax may wish to consider creating a charitable lead trust as a means to fund an endowment. This allows you to transfer assets into the trust and designate that income be paid to the IU School of Medicine for a fixed number of years or for your lifetime. Upon your death or at the end of the predetermined period, the trustee will distribute the remaining balance to your heirs. Whether you create and fund this trust during your lifetime or in your estate plan, it is an excellent way to minimize taxes and provide assets to your loved ones, while also creating a lasting legacy at the School of Medicine.