

# DIAMOND



Ken and Debby Cohen

Ken Cohen has always been known as a gadget guy. He likes to tinker and take things apart. He's a puzzle solver. But in 2011, he was faced with what seemed the unsolvable: He was diagnosed with throat cancer. In an instant, life changed for Ken and his wife, Debby. *Continued on page 2*

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# The Gift of Gratitude

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Their battle with cancer had begun. The Cohens are committed to sharing their story and they are clear it is *their* story. “We were involved in the treatment together,” Ken shared. “Both people get cancer and are affected.” He said Debby did whatever she had to do, including staying by his side, driving him to the hospital every day and talking with the doctors.

Five years later, a vibrant and thankful Ken Cohen credits Pierre Lavertu, MD, Director of Head & Neck Surgery and Oncology at University Hospitals, with saving his life. Today he and Debby are traveling the world, enjoying culture and living a full life in Florida and Ohio. Their gratitude is reflected in the couple’s generous gift supporting University Hospitals Proton Therapy Center, and the Cohens are honored through the Kenneth and Deborah Cohen Lobby.

“We’ve been fortunate in every possible way and it seems only fitting that we should be able to do this,” said Debby.

And, of course, with Ken being a gadget guy, he’s enchanted with the remarkable, revolutionary machine that can benefit patients, especially children and young adults, who are more susceptible to complications from traditional radiation therapy.

“I’m astonished by this machine. It has a magnet so powerful it has to be cooled down to 4 degrees Kelvin,” Ken expressed. “It’s an amazing piece of technology and we know just how much it means for the people of Cleveland.”

Ken was born in the Bronx, New York, and grew up in Westchester County. He graduated from Harvard Law School. Soon he was teaching tax law at Case Western Reserve University. He practiced law for a few years and then began writing tax planning computer software, which he’s busy with today.

Debby grew up in Avon Lake and received a master’s degree in education from John Carroll University. She was involved in social work for a while, but later began working in Ken’s business office.

When it comes to law, Ken’s first love is taxation. “It’s like a great big puzzle, a lot of moving parts that somehow have to work together,” he explained.

Tax law, something that scares off most of us, barely seems like work to him. Yet Ken said he has only to look to UH and the highly skilled doctors, clinicians and caring staff to gain a true appreciation for hard work.

UH staff began working tenaciously on Ken’s life-threatening condition from the moment he noticed the unusual lump in his neck. It started with his internist, David Rosenberg, MD, who immediately ordered a scan and referred him to Dr. Lavertu for early intervention and aggressive treatment. “From the support of all the doctors, nurses and social workers, we were thrilled with the care I received and happy with the results,” Ken said. “Dr. Lavertu did an amazing job. He has endless energy directed toward his patients. His family makes a lot of sacrifices because of that dedication, and they don’t always get the credit they deserve.”

The Cohens will never forget the grueling regimen of surgery, radiation and chemotherapy, and the long and difficult recovery period. Ken couldn’t eat for weeks after and when he could, the sensation of taste seemed lost. Ken attributes his successful recovery to Min Yao, MD, PhD, his radiation oncologist at University Hospitals Seidman Cancer Center. The Cohens also got to know the staff in radiation oncology on a first-name basis. “They were amazing,” Ken recalled. They had a CD player and let him select his choice of music for the seemingly endless radiation treatments.

“It’s an amazing piece of technology and we know just how much it means for the people of Cleveland.”

– Ken Cohen



## “We feel grateful to University Hospitals and thankful for our lives.”

– Debby and Ken Cohen, Diamond Legacy Society Members

Ken was among the first patients treated at UH Seidman Cancer Center. “It’s a terrific place that was well planned,” Debby shared. “It was built with great vision, making it comfortable for the patients and their families.”

“All the people at UH made it as easy as they could,” Ken said.

Still, it was not easy and they had their days. When would the exhaustion and major side effects of treatment end? They moved about as if on autopilot.

One day Debby headed to the pharmacy at UH to pick up a prescription for Ken. She noticed a woman and her daughter passing the time by playing a game. “That girl had no hair, wore a hat and had a feeding tube,” said Debby, consumed with emotion retelling the story. “Her mother was doing everything she could for her. I thought about how caring she was. There are so many people so much worse off than we are. It put it in perspective. My mind goes back to that girl and her mom, and it’s something I can’t forget.”

So when the couple made their gift supporting the new UH Proton Therapy Center, it seemed to be exactly the right thing. “I feel that it has come full circle,” Debby said. “All too many kids go through treatment, and we hope that the new center will make a real difference.”

The whole experience has made the Cohens reflective, especially as they ponder life’s most puzzling questions. But Debby and Ken have found their answer: “We feel grateful to University Hospitals and thankful for our lives.”

*UH Diamond Advisory Group member Roger Shumaker, Esq., of McDonald Hopkins, assisted UH benefactors Debby and Ken Cohen in the planning necessary to make their meaningful gift to University Hospitals.*

## POWERFUL CANCER-FIGHTING TECHNOLOGY UH Proton Therapy Center

### #1 in Region

University Hospitals Cleveland Medical Center now offers proton therapy to cancer patients throughout a five-state region. UH is Ohio’s first proton therapy center and one of only 24 centers operating in the United States.

### Valuable in Treating Children, Adolescent and Young Adult Cancer Patients

The UH Proton Therapy Center is just steps away from the nationally ranked UH Rainbow Babies & Children’s Hospital and the Angie Fowler Adolescent & Young Adult Cancer Institute. This proximity is critical, as proton therapy is especially valuable in treating children, adolescent and young adult cancer patients.

### Among an Elite Few

With the addition of proton therapy, UH Seidman Cancer Center joins an elite few in the nation to offer every radiation therapy technology available to fight cancer.

### Targeting Tumors

Proton therapy is a highly advanced technique that allows radiation oncologists to target tumors with the maximum cancer-destroying capabilities of radiation, while decreasing the dose to healthy tissue and organs.

### Compact and Powerful

The MEVION S250 is a first-of-its-kind, compact model that more efficiently and cost-effectively delivers powerful cancer-fighting proton beam radiation therapy.



# Know Your Options for Year-End Giving

There are compelling reasons that motivate supporters like you to consider charitable giving to University Hospitals at year-end. You may want to support the annual fund, create an income stream during retirement, dispose of highly appreciated assets in a tax-efficient manner or continue a family legacy. And, perhaps you want your gift to support a specific program or department, or honor a loved one or a physician. Whatever your motivation, knowing your options and making the best choice can help you realize your philanthropic goals in a personally satisfying way.

## **CASH – SAVE ON TAXES**

Cash is the most direct way to make a gift that is immediately available to support University Hospitals. Your gift also qualifies for a charitable deduction (up to 50 percent of your adjusted gross income) in the year of the gift, with five carryover years, making the net cost significantly less than the actual amount of the gift.

## **APPRECIATED ASSETS – DOUBLE THE BENEFITS**

When you make a gift of appreciated stock or other assets held for more than one year, you benefit from a double tax savings. You avoid paying capital gains tax on the appreciated amount – a tax you would have paid if you had sold the asset outright. And, you receive a charitable deduction (up to 30 percent of your adjusted gross income) based on the value of the assets at the time of the gift, with a carryover of any excess deduction for five additional years.

## **CHARITABLE GIFT ANNUITY – MAKE A GIFT THAT LASTS A LIFETIME**

A charitable gift annuity is both a gift from you and an income to you. In exchange for your gift, UH will provide fixed payments to you and/or your spouse, a parent or someone else (two beneficiaries maximum) for life. The gift portion generates a charitable deduction, and the annuity portion provides a lifetime income based on a payout rate specific to your age. You may also enjoy favorable tax advantages on the payout from the gift annuity, with a portion being income tax-free for your expected lifetime.

**Note:** *If you fund a gift annuity with appreciated assets, in addition to receiving a charitable deduction and annuity payments for life, the capital gains tax is based on only part of the appreciation. In addition, you can spread out the capital gains over your life expectancy.*

## DEFERRED GIFT ANNUITY – INCREASE RETIREMENT INCOME

The deferred gift annuity works just like an immediate gift annuity, except that the start date for payments is postponed until a specific time, such as your retirement. A deferred gift annuity has two advantages over an immediate gift annuity. The payout rate is higher and can help supplement income in later years. And, the current charitable deduction is higher, a real advantage now in peak earning years.

## FLEXIBLE GIFT ANNUITY – START PAYMENTS WHEN IT'S BEST FOR YOU

If you want the benefit of a deferred gift annuity but are not exactly certain of when you would like the annuity payments to begin, consider the flexible gift annuity. You can set a target date for starting the payments, but you have the flexibility to push that date back as it approaches. Similar to the deferred gift annuity, the longer you defer the income, the higher the annuity payments.



DIAMOND LEGACY SOCIETY MEMBERS

## The Many Gifts of Giving

Bob and Susan Conrad have discovered that there are many paths to giving and each one has surprising consequences.

The Hudson couple gives generously to University Hospitals in so many ways, yet they say they are the lucky recipients. Their gifts include annual donations to the UH Art Fund. They have also taken advantage of the IRA Charitable Rollover to support the UH Endowed Art Fund and the Angie Fowler Adolescent & Young Adult Cancer Institute at UH Rainbow Babies & Children's Hospital. And, they are leaving a meaningful legacy by remembering UH in their estate plans.

If there's a UH event, Bob and Susan are likely to attend. They attended an art tour at University Hospitals Ahuja Medical Center where they learned about the Fine Art Collection at UH from curator Tom Huck. That whet their appetite for all things UH. They've also attended Rainbow 101, an insider's view of the lifesaving care that defines UH Rainbow Babies & Children's Hospital. It was a learning experience for the Conrads to meet compassionate and dedicated physicians and to hear about teenage cancer and the importance of donations for continued research. And, they're always ready for the next UH adventure.

Adventure is practically Bob Conrad's middle name. With a law enforcement, political science and international relations background, he became a



Bob and Susan Conrad

special agent with the Bureau of Diplomatic Security in the Foreign Service Office of the U.S. Department of State. His adventures read like a Tom Clancy novel filled with intrigue and cliffhangers. He speaks seven languages. His career took him to El Salvador, Yemen, Australia, Mongolia, and Chad and Mozambique, Africa, where Susan started two regional schools. This was her calling since she had taught school in Virginia for over 20 years where she worked with gifted and challenged children.

The Conrads are worldwide travelers. "People are wonderful all over the world," reflected Susan. "We appreciate being immersed in their cultures, just as we appreciate America."

They also appreciate University Hospitals. Bob was especially grateful to surgeon John Shaffer, MD, Department of Orthopedics at UH Cleveland Medical Center, who repaired his broken wrist. "It was a complicated surgery and I received excellent care," said Bob. "I am very pleased with the outcome."

The couple, who has been married 44 years, shared that UH has opened its heart to them. "We feel like we're a part of a big UH family," expressed Susan. "UH cares

that we have the opportunity to learn firsthand about the hospital's innovative work and discoveries."

These music and art lovers will soon be giving UH a gift of art from their world travels. It's all part of the fascinating exchange of gifts.

And, like the old adage, the Conrads have learned that to give is to receive. "It's gratifying to be around people at University Hospitals who feel the same way about giving and building a world for the next generation," observed Bob. "We're happy to be helping to improve the lives of others. Really, it's a gift."



## Family Supports Community's Treasured Hospital – UH Geauga Medical Center

Sara and Gerry Hornick built their life together on a strong foundation of family and community. Married 56 years, they raised six wonderful children who blessed them with 10 grandchildren and, recently, a great-grandchild.

Their story begins when Gerry, a Union Carbide engineer, moved to West Virginia for his first job. There he met Sara, his wife-to-be, at a football game, and the rest is history.

In 1967, Gerry was transferred back to Ohio and the young couple moved to Chardon. Sara, a grade school teacher, adored children. Gerry launched factories, traveling to places such as Belgium and India, and on occasion Sara came to visit. One of his fondest memories is a side trip they took to Paris. Sadly, the love of his life died in 2013, three years after being diagnosed with breast cancer.

Grateful for the outstanding patient-centered care provided by Melanie Carlson, MD; David Smith, MD; and other UH physicians and staff, Gerry made a generous estate commitment supporting University Hospitals Geauga Medical Center.

A plaque “in memory of Sara R. Hornick” is displayed as you enter into the Healing Garden at UH Geauga Medical Center. The garden provides respite for patients



Gerry and Sara Hornick

and families and is also used for physical therapy. It seemed to be the perfect setting to recognize Sara, a gardener who loved working the soil both indoors and outside.

Post retirement, Gerry began his new hobby of flying planes. Today, he no longer flies, but meets regularly with friends at the Geauga County Airport.

He continues to be very involved with UH Geauga Medical Center and stays connected with good friends in leadership positions. “Maybe it’s

because I thought I wanted to be a physician when I went to Johns Hopkins and follow in my brother’s footsteps,” speculated Gerry, who instead turned to engineering.

He served on the board of Geauga Hospital before it became UH Geauga Medical Center in 1995. That’s when UH began a significant investment improving facilities and services, transforming the community’s treasured hospital.

Gerry has also served on the Geauga Medical Center Leadership Council for 15 years and helped raise the capital to build the Geauga YMCA. In 2014,

UH Geauga Medical Center’s Annual Leadership Appeal raised funds to renovate space at the YMCA, which is used by UH as an outpatient physical therapy facility.

“I’m so proud that our community hospital has come such a long way,” said Gerry. Today, UH Geauga Medical Center has entered into a new phase of its history to better meet the growing and complex health care needs of the community. Gerry affirmed he couldn’t have engineered it any better.

### Know Your Options for Year-End Giving

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#### IRA CHARITABLE ROLLOVER – MAKE AN IMMEDIATE IMPACT

Legislation signed at the end of 2015 permanently extended the popular gift option known as the IRA Charitable Rollover. This is good news for IRA owners age 70½ and over who want to support University Hospitals now and in the future. There is no need to wait until year-end and it’s easy to do.

- Instruct your IRA custodian to make a distribution – up to \$100,000 – directly to University Hospitals.
- Counts toward your required minimum distribution and is excluded from your gross income for federal tax purposes.
- Qualified distributions transferred to UH by December 31 will count as a tax-free rollover for 2016.

## ENDOWMENT – ONE GIFT, MANY HAPPY RETURNS

One of the most expressive ways to make an impact for generations to come is through an endowment. When a gift is made to create an endowment or add to an existing endowment, the earnings of the fund continue to support UH year after year. Endowments are a powerful way to perpetuate your annual gifts to University Hospitals, providing a legacy for you or a loved one for a purpose that is most personally meaningful.

## THE CHOICE IS YOURS

Knowing your charitable gift options and making the best choice can help you realize your philanthropic goals. All gifts to University Hospitals are greatly appreciated. With your support, we continue to live our mission every day: To Heal. To Teach. To Discover.

*The Gift Planning Team would be happy to work with you and your advisors to explore the best gift option for you. Call 216-983-2200 or visit [UHGiving.org/GiftPlanning](http://UHGiving.org/GiftPlanning).*

## University Hospitals 2016 Distinguished Advisor

University Hospitals honored **Douglas J. Smorag, CPA/PFS, CM Wealth Advisors**, with the 2016 Distinguished Advisor Award at the Diamond Advisory Group annual meeting held in June at Progressive Field, chaired by James A. Goldsmith, Esq., Ulmer & Berne, and hosted by Paul J. Dolan, Chairman and Chief Executive Officer, Cleveland Indians.

The award, presented by Thomas F. Zenty III, Chief Executive Officer of University Hospitals, recognized Doug for his role in helping individuals and families create meaningful legacies at UH. Family, friends, colleagues and clients, including UH supporters Kathy Coleman, and Bill and Kathy O'Neill, attended the event in support of this tribute.

Doug is Senior Vice President, Chief Financial Officer and Board Director with CM Wealth Advisors, a pre-eminent, multifamily office offering objective counsel, exceptional client service and a disciplined, sophisticated approach to investment management. Doug's tireless client advocacy and his ongoing support of their philanthropic gifts benefiting University Hospitals and other charitable endeavors has earned him the respect of

his peers, clients and the community. Doug has been a CPA for more than three decades and serves as trustee, treasurer and director of several charitable foundations and associations.

*"This award is all about our collective, wonderful clients who step up time and time again to support University Hospitals in the fulfillment of its mission." – Doug Smorag*



from left: Doug Smorag, Tom Zenty, Jim Goldsmith

### PAST UH DISTINGUISHED ADVISOR AWARDEES:

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**Bernard Karr, Esq.**, McDonald Hopkins

**Eugene Kratus, Esq.**, Weston Hurd

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## DIAMOND NEWSLETTER

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DIAMOND HEIRLOOMS GIFTS FROM THE PAST SHINE INTO THE FUTURE

# Staging a Family Legacy

All the world's a stage. Just ask Maggie Affelder Cain. The Shaker Heights native, one of two daughters of Ruth and Lewis Affelder, thanks her parents for giving her the acting bug.

It wasn't always so. Maggie was shy, so her parents sent her and her sister, Jeannie Affelder, off to acting classes, which they continued throughout high school. The recipe worked: The two now live in Chicago and are both professional actors.

Today, Maggie and Jeannie remember their parents as quiet and gracious, and active in their community. Their dad's love of theater found a home at the Cleveland Playhouse. Meanwhile, their mom volunteered at the Cleveland Hearing & Speech Center and in the Shaker Heights schools.

from left: Lewis and Ruth, honeymoon trip to Europe on SS Liberté, 1957; Lewis and Ruth at daughter Maggie's wedding, 1990



The two met on a blind date in Cleveland. They were married in Philadelphia, Ruth's hometown, and honeymooned in Europe. The couple returned to raise their family in Lewis' native Cleveland.

After college, Lewis worked in the family business, the Wolf Envelope Company, which his grandfather, Louis Littman, started. His father, Harry F. Affelder, a community leader in health care and a philanthropist in his own right, was an engineer who developed more efficient machinery, which grew the company.

University Hospitals has played a longstanding role in the family's health care over the years. Maggie and Jeannie were both born at what is now University Hospitals MacDonald Women's Hospital.

And when their mother battled ovarian cancer, UH was there. Ruth was especially fond of her UH physician, John Murphy, MD, during her cancer journey. "Mom was grateful for his



wonderful clinical skills, empathetic bedside manner and the priceless gift of his time by always listening to her," recalled Maggie.

In recognition of the compassionate care the family received, the Affelders designated a percentage of their trust held at the Cleveland Foundation to UH. This gift, in perpetuity, supports the Hematology Fellowship Fund at Lakeside Hospital, the cornerstone of today's UH Cleveland Medical Center.

The family legacy of educating health care professionals continues through Maggie and Jeannie's first cousin, John Hexter, and his wife, Mary Ann, who recently established the John B. Hexter Family Endowed Healing Touch Fund. Their fund provides ongoing support to educate and train clinical nurses and volunteers to advance and personalize the patient experience and healing process within University Hospitals Connor Integrative Health Network.

And, that's just the kind of generosity that makes actors Maggie and Jeannie grateful for the starring roles their family has played in producing a meaningful legacy at University Hospitals.

**Leave your legacy.**

Remember University Hospitals in your estate plans.

To learn more, please call 216-983-2200.