


DIAMOND



Christine Spano

Christine “Chris” Spano still feels happiest in the enchanting, medieval-inspired home she and her husband, Kenneth A. Spano, MD, fell in love with and poetically named Moyenage. The Bratenahl home was an oasis for Dr. Spano, a passionate and highly regarded thoracic surgeon at University Hospitals. *Continued on page 2*

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2017 Distinguished Advisor

Investing in Hope

LEGACY GIFT HONORS DR. KENNETH SPANO

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Dr. Spano, known to friends and colleagues as Ken, had an immeasurable impact on his patients, students and staff. He passed away in 2014 at age 70 following a two-year battle with acute myeloid leukemia. A generous gift from his wife, Chris, to University Hospitals Seidman Cancer Center in the areas of leukemia research and oncology nursing pays fitting tribute to the physician and scholar.

A graduate of St. John's University in New York City and George Washington University School of Medicine and Health Sciences in Washington, D.C., Ken met Chris, a surgical nurse, while he was finishing his medical school coursework. The couple married in 1968. After completing his residency in 1973, he was called to active military duty in Beaufort, South Carolina, where he served two years with the United States Navy.

Following his military service, Ken accepted a job as a thoracic surgeon in Cleveland. He practiced with distinction for nearly four decades, including 20 years with University Hospitals. After retirement, he taught surgical anatomy at Case Western Reserve University School of Medicine. He loved teaching

and by all accounts was a warm and engaged educator, admired by students and colleagues alike.

Ken and Chris were well known and actively involved in their Bratenahl community. Ken served on the board of the Shoreby Club for nine years, including four years as president. He also served on the Bratenahl Newport Harbor Board for 10 years, seven as president. He was known for his honesty and integrity.

“Ken always easily and eloquently advocated the need for good governance, citizen inclusion and accountability,” said Laura Bacci, a former Bratenahl council member and good friend. Ken was also known for his clever sense of humor, his love of language, and his many hobbies and interests, including model trains and tinkering with cars and boats in need of repair.

In fact, boating was one of Ken's great passions. After retiring from his surgical practice, Ken and Chris frequently could be found on their motorboat, *Kriscen*. Cleverly named by Chris' mother as a play on the couple's combined first names, *Kriscen* actually was the name Ken and Chris gave to five boats, in succession.

Over the years, the Spanos have given back to many local organizations, but University Hospitals has always held a special place in their hearts. During Ken's illness, the couple developed a friendship with Marcos de Lima, MD, Director of the Hematologic Malignancies and Stem Cell Transplant Program at UH Seidman Cancer Center.

Grateful for the compassionate care her husband received from Dr. de Lima and the nurses and staff at UH, Chris wanted to support Dr. de Lima's work to help find a cure for leukemia (see sidebar, page 3).

Chris' generous gift through retirement plan assets, made in loving memory of her husband, establishes two funds: the Kenneth and Christine Spano Fund for Leukemia Research under the direction of Dr. de Lima and the Kenneth and Christine Spano Oncology Nursing Fund.





The late Kenneth Spano, MD, and Christine Spano

“Dr. Spano was a scholar, and both he and Mrs. Spano were highly attuned to his treatment and advances in the field that could help him and others. For us, the gift fits perfectly with our efforts in leukemia research,” Dr. de Lima said.

At Dr. de Lima’s suggestion, the nursing fund will support collaboration between UH Seidman Cancer Center oncology nurses and a nurse scientist. They will work together to develop and implement special projects to improve patient care, quality of life and survivorship under the direction of the Chief Nursing Officer at University Hospitals, currently Jean Barrett Blake, RN, BSN, MJ.

“Mrs. Spano’s gift to nursing is special because it supports research that aims to improve quality of life for patients and their loved ones. It looks at the whole person and asks, what is the best plan for this individual,” said Ms. Blake.

“Nurses bring a humanistic view to cancer care and cancer research,” added Dr. de Lima. “These roles have to be nurtured, valued and advertised. That’s why I suggested to Mrs. Spano, a former nurse, to consider participating in and supporting oncology nursing here.”

According to Chris, Ken lived by the motto, “Always do the right thing for one and all.” True to his words, this legacy gift does the right thing by investing in hope for a better future for patients with cancer.

UH Diamond Advisory Group member Steve Caine, Esq., and personal advisor Rich Robins assisted UH Benefactor Christine Spano in the planning necessary to make her meaningful gift to University Hospitals.

“I am grateful to Dr. de Lima and University Hospitals for working so passionately on Ken’s behalf. The people at UH were supportive and caring.”

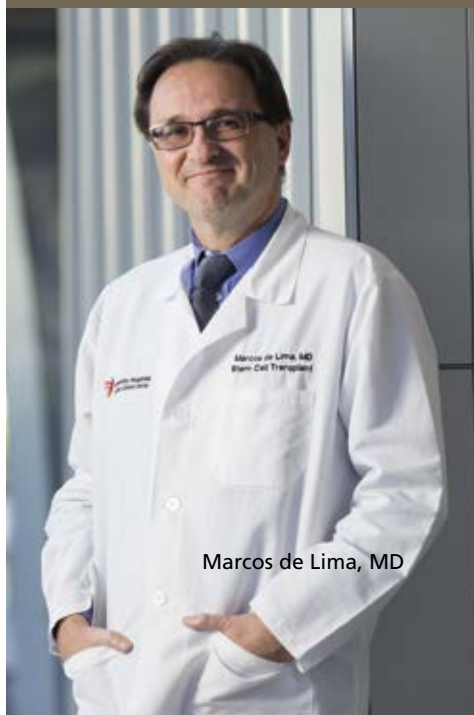
– Christine Spano, Diamond Legacy Society Member

SEARCH FOR A CURE

Marcos de Lima, MD, Director, Hematologic Malignancies and Stem Cell Transplant Program at UH Seidman Cancer Center and the Don C. Dangler Endowed Director in Stem Cell Transplant, has been working diligently toward a cure for patients with leukemia and other blood cancers, with a focus on cell therapy.

His search for a cure will get a boost from a significant gift from Christine Spano, in loving memory of her husband, Kenneth Spano, MD, who passed away from acute myeloid leukemia. Dr. de Lima was his physician.

“This generous gift will enable us to continue to develop our program into an internationally recognized center for acute leukemia research and care,” said Dr. de Lima. “Dr. Spano was a man of science, inquisitive and knowledgeable. We plan to use this gift to honor his memory – by funding the translation of basic science concepts into new treatments and nurturing new investigations into the field.”



Marcos de Lima, MD

Dr. de Lima and his team are investigating approaches that combine cell therapy and drugs, with the goal of allowing the immune system to be more effective against leukemic cells. According to Dr. de Lima, this approach may use the patient’s own cells or possibly donor cells. While stem cell transplant remains a possibility, the goal is to avoid the procedure altogether.

A LEGACY OF GIVING AT

Shaping Your Personal Legacy The word *legacy* is often described as a gift or something handed down to someone else. However, a legacy is actually much more. In a very real and important way, a legacy is how we remember someone – the character traits, disposition or life work that immediately comes to mind when a name is mentioned. Consequently, it can be personally satisfying to consider what your legacy will be.

YOUR IMPACT ON OTHERS

Another way to think about your personal legacy is to consider the impact you have on others. What are the values and causes that mean the most to you, and what can you do to perpetuate those values and support those causes? Most of us have a natural desire to make a difference for others and the community.

A CONNECTION WITH COMPASSION

University Hospitals and the patients we serve have profoundly benefited from thoughtful individuals who made the decision to include UH in their charitable planning. The personal legacies of generations of supporters are forever connected with compassion for others and the desire to make quality health care available and accessible.

The Story You Write Many different giving options are available to help shape the story you write – the legacy you leave – at University Hospitals. We invite you to consider one or more of the following gift plans in support of our mission: To Heal. To Teach. To Discover.

CHARITABLE BEQUEST

A charitable bequest through your will or trust can shape your personal legacy and provide an expressive way to support University Hospitals through your estate plans.

Although you can carefully plan this gift now, the gift itself only takes place when your estate or trust is administered at some time in the future. You retain control of these assets during your life, and you can revise the bequest whenever you choose. Your attorney can help you create or change your will or trust to include a gift to UH. To ensure that your wishes are fulfilled, we encourage you to inform us.

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SAMPLE BEQUEST LANGUAGE:

"I give, devise and bequeath (*insert amount, percentage or specific asset*) to **University Hospitals, Cleveland, Ohio**, to be designated for (*area of greatest need or desired designation*)."

UNIVERSITY HOSPITALS

DIAMOND LEGACY SOCIETY MEMBER

Leaving a Meaningful Family Legacy to Support Pediatric Innovation

Jack Belcher's generous gift designation to University Hospitals through his trust is a perfect fit. A retired educator and administrator for the Cleveland Metropolitan School District, Jack is supporting intellectual discovery at UH Rainbow Babies & Children's Hospital. The Belcher-Weir Family Pediatric Innovation Program will endow and expand Pediatric Innovation Day, an annual event that celebrates ingenuity and rewards UH employees for ideas that have the potential to result in medical breakthroughs in pediatric care.

Knowing his parents would be honored to have their family name associated with this gift, Jack was very involved in making his legacy meaningful and came to committee meetings to give his input. Jack also contributes annually to Pediatric Innovation Day to engage keynote speakers who share their expertise on the importance of innovation.



Jack Belcher and Odin

As an art collector, Jack's engagement with UH goes beyond innovation. He is a member of the National Art Leadership Council at University Hospitals and supports the UH Fine Art Collection. Over the years, he has also contributed gifts of art to UH.

Jack is also passionate about dogs, in particular his best friend and companion, Giant Schnauzer Odin. He recognizes their value as therapy, assistance and service dogs. Jack has been involved with the Grafton Correctional Institution where both inmates and dogs rehabilitate through the Love-A-Pup Program.

Recently, Jack designated an additional gift to support pediatric innovation at UH in gratitude for the life-saving care he received. "Over the past several years, I have developed a deep appreciation for University Hospitals' impressive contributions to our region's health care," reflected Jack. "I was the recipient of high-quality surgery, and I am thankful to Rod Rezaee, MD, FACS, Director of Head & Neck Reconstructive Surgery at UH Cleveland Medical Center, for his empathy, and immediate and expert attention to my health care needs."

To support pediatric innovation at UH Rainbow Babies & Children's Hospital, please call 216-983-2200 or visit UHgiving.org.

Diamond Legacy Society

A generosity of spirit, shining for generations

We recognize and celebrate the following individuals who have made an endowed, estate or other planned gift to University Hospitals. We are extremely grateful for this generosity bestowed by generations of patients and families. Join the many who are making a difference at University Hospitals.

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If University Hospitals is included in your estate plans and you are not listed, we encourage you to inform us. This gives us the opportunity to thank you and celebrate your generosity through membership (which may be anonymous) in our Diamond Legacy Society. Call our Gift Planning Team at 216-983-2200.

A Legacy of Giving at University Hospitals

Continued from page 4

LIFE INSURANCE

You can also plan now and give later through life insurance. One option is to simply name University Hospitals as the beneficiary of an existing policy. There is no out-of-pocket cost. All you need to do is request a change of beneficiary form from your insurance company.

Another option is to give a paid-up life insurance policy that is no longer needed for its original purpose. This can be a very attractive way to make a significant gift that may also create an income tax deduction. You can contact your insurance company and ask for the form used to transfer policy ownership.

ENDOWMENT

One of the most meaningful ways to shape your legacy is through an endowment at University Hospitals to honor a loved one, recognize a physician or support a special program. When a gift is made to an existing endowment or to create a new endowment, only the earnings are used to support your specific designation so that the endowment will last perpetually, providing annual gifts for this purpose year after year.

The significance of an endowed gift is that you can enjoy its impact today, knowing that your gift will also make a real difference for future generations.

CHARITABLE GIFT ANNUITY

A charitable gift annuity is part gift and part annuity. It is unique because the gift creates an exchange. In its simplest form, under an agreement between you and University Hospitals, UH contractually agrees to pay a

lifetime income to you in exchange for your gift. The income amount depends on your age, the amount of the gift and when the lifetime payments begin. In addition, the "gift portion" qualifies for a tax deduction.

A charitable gift annuity can cover the lives of one or two people, and there is great flexibility in designing your plan. Making a larger gift or deferring the start of payments will result in a higher payout.

INDIVIDUAL RETIREMENT ACCOUNT

If you are an IRA owner age 70½ or older, Congress has provided a smart giving opportunity to make a gift to University Hospitals directly from your IRA. This qualified charitable distribution, or "IRA Charitable Rollover," was made permanent by 2015 legislation. There are three distinct benefits to this gift:

- ◆ You pay no income tax on the distribution (subject to a \$100,000 limit).
- ◆ You can count it toward your required minimum distribution.
- ◆ You can make this gift year after year – a tax-wise way to meet your philanthropic goals.

Contact your account custodian to arrange your gift, and we encourage you to notify us as well. **Note:** You can also designate UH as a beneficiary of your retirement plan assets by requesting a change of beneficiary form from your account custodian. Since UH is a qualified charitable organization, assets left to us are received in full with no income tax due.

Write Your Story The personal legacy you leave at University Hospitals will make a difference for generations to come. The Gift Planning Team would be happy to work with you and your advisors to help meet your philanthropic goals through a thoughtfully planned gift.

Call 216-983-2200 or visit UHGiving.org/GiftPlanning.



Making a Difference Today and Tomorrow at UH St. John Medical Center



Debbie and Tim Doyle

When asked how he and his wife, Debbie, became supporters of University Hospitals St. John Medical Center, Tim Doyle paused, thought a moment, and paraphrased a famous quote: “To those whom much is given, much is expected.” The owner of Doyle Insurance Services in downtown Cleveland, Tim speaks with enthusiasm about the benefits of giving, and of a job he obviously loves, saying, “It is immensely rewarding when you see what you can do to get people through tough times.” Debbie shares that sentiment and volunteers for a number of causes that help local families in need.

An invitation in 2010 to join the St. John Medical Center Leadership Council initiated the Doyles’ involvement with UH. By 2013, Tim was chairing the leadership council and led the effort to obtain 100 percent giving participation, a first for the group. Funds were allocated to purchase a statue that graces the hospital’s entrance.

Although the Doyles have given considerable time and support to UH St. John Medical Center, they remain modest about their philanthropy.

They are sponsors of the annual golf classic and gave generously to the renovation of the chapel, where families of all faiths find comfort and solace. It was only when Tim’s mother went into the chapel and saw the plaque bearing the family name that she found out about their meaningful gift.

Debbie and Tim have known each other since their middle school days in Bay Village, the town they still call home. Their three adult children and growing families live nearby, and the newest addition, a granddaughter, was recently born at UH St. John Medical Center. “We are continually grateful for the compassionate care given to our family,” said Debbie.

Having travelled the world, the Doyles mutually agree on their all-time favorite destination: the small, rustic cabin they own in the faraway woods of Canada – accessible only by an eight-hour drive and a 20-mile boat trip down a winding river. It is their home away from home for an entire month every summer. There are no phones, no stores, no television, no running water and no other people for miles. They catch up on reading, conversation and star gazing. It’s peaceful and unspoiled, life at its simplest and most beautiful.

Planning for the future is second nature to Tim, a third-generation insurance professional. Tim and Debbie are leaving a legacy to help make a difference for future generations – they have designated UH St. John Medical Center as a beneficiary of their life insurance policy. “We also want to give while we’re alive,” Tim reflected. “There is a point in life when it becomes less important to acquire things and more important to have an impact.”

To support the work at UH St. John Medical Center, please call 216-983-2200 or visit UHgiving.org.



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DIAMOND NEWSLETTER

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PHOTOGRAPHY: Keith Berr, Julie Hahn,
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DIAMOND ADVISORY GROUP ANNUAL MEETING

University Hospitals Honors 2017 Distinguished Advisor

The Diamond Advisory Group annual meeting, chaired by James A. Goldsmith, Esq., Partner, Ulmer & Berne, was held in June at Progressive Field. Paul J. Dolan, Honorary Chair of the group, and Chairman and Chief Executive Officer of the Cleveland Indians, welcomed the crowd. Patricia M. DePompei, RN, MSN, President, UH Rainbow Babies & Children's and UH MacDonald Women's hospitals, presented the vision for the UH Rainbow Center for Women & Children, slated to open in 2018, which will offer a new home for pediatric and women's health services in MidTown.

Janet W. Havener, MBA, Fairport Asset Management, was honored with the 2017 Distinguished Advisor Award. Daniel I. Simon, MD, President of UH Cleveland Medical Center, presented the award and recognized Janet for her role in helping individuals and families create meaningful legacies at UH.

"One of the joys of my profession as a wealth planner is working with such wonderful, philanthropic families who show their love for University Hospitals by their generous gifting." – Janet Havener

Janet serves as Director of Wealth Advisory Services at Fairport Asset Management, with over 30 years of experience in estate, tax, charitable, financial and retirement planning to high-net-worth individuals, families and family offices. Prior to joining Fairport in 2013, Janet served as Relationship Manager of Wealth Advisory Services at a local trust company and as Personal and Succession Planning Administrator at prestigious Cleveland law firms. She is a member of the Institute of Certified Financial Planners and the Estate Planning Council of Cleveland. Active in many community organizations, Janet also serves on the board of several local associations and non-profits.



(left to right): Dr. Dan Simon; Paul Dolan; Janet Havener; Patti DePompei; Jim Goldsmith

Past UH Distinguished Advisor Awardees:

- William Karnatz Sr., Esq.**, Perry & Karnatz
- Bernard Karr, Esq.**, McDonald Hopkins
- Eugene Kratus, Esq.**, Weston Hurd
- Jon Pinney, Esq.**, Kohrman Jackson & Krantz
- Maria Quinn, Esq.**, The O'Brien Law Firm
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- Douglas Smorag, CPA/PFS**, CM Wealth Advisors
- Catherine Veres, CPA/PFS, CFP**, Cornerstone Family Office
- Jeffry Weiler, Esq.**, Tucker Ellis
- Marcia Wexberg, Esq.**, Calfee, Halter & Griswold

Leave your **legacy.**

Remember University Hospitals in your estate plans.