

## Ways of Giving

### Outright Gift

Making a charitable contribution by check or credit card can help reduce the amount of federal income tax you need to pay to the IRS. Current tax brackets are 33%, 35%, and the highest bracket is 39.6%. The higher the tax bracket the greater tax savings an individual receives from his/her charitable giving.

Example: A \$50,000 gift would actually cost the donor \$30,200 (a tax savings of \$19,800 for someone in the 39.6% tax bracket). A \$25,000 gift would actually cost the donor \$16,750 (a tax savings of \$8,250 for someone in the 33% tax bracket).

### Multi-Year Commitment

Pledges to the 75th Anniversary Campaign can be payable over three years. Each donor can choose a payment plan of annual, quarterly, or monthly gifts to fulfill their pledge by check or credit card.

### Appreciated Publicly-Traded Stock

A gift of stocks or bonds held more than a year that have grown in value, not only qualifies for a charitable contribution deduction (based on the fair market value), but also avoids capital gains tax on the appreciated portion of the gift.

### A Portion of the Required Minimum Distribution from Your IRA (for those 70½ or older)

Required minimum distributions from an Individual Retirement Account (IRA) are treated as income and so you must pay income taxes on them. By donating a portion or all of your minimum distribution, you will not have to take the required amount as income and pay taxes on it. Instead, you can have any amount you want – up to \$100,000 – paid to ACOI by making a Qualified Charitable Distribution.

This type of gift does not qualify for a tax deduction for a charitable gift; rather you realize a savings in income taxes since you did not receive this distribution as income. In addition, the amount you have paid to ACOI will count toward the required minimum distribution that by law you must receive from your IRA beginning at 70½ years of age. For many who want to help ACOI, this is a win-win scenario, but planning is important. You should let us know if you want to help in this way because you need to notify your IRA administrator at least six weeks in advance and before you take your distribution.

## Some Possible Scenarios for Supporting the 75th Anniversary Campaign Include:

### For retirees

- Outright gift or multi-year pledge
- A portion or all of your required minimum distribution (for those 70½ years of age)
- Gift of appreciated publicly-traded stock

### For those who have been in the profession for many years and are still working

- Outright gift or multi-year pledge
- Gift of appreciated publicly-traded stock

### For those who are newer to the profession

- Become a monthly donor to fulfill an outright gift or multi-year pledge
- Gift of appreciated publicly-traded stock

*The 75th Anniversary Campaign is not to build a building or establish a scholarship program. It is to fund a once-in-a-lifetime idea to benefit and preserve osteopathic internal medicine for future years.*

*“We will not be able to achieve ACOI’s ambitious plan to advance and preserve osteopathic internal medicine without your generous support. The College hopes you will see your financial investment in our future as a part of your legacy as an osteopathic internist.”*

*Lawrence U. Haspel, DO, MACOI  
75th Anniversary Campaign Chair*

# Assuring the Future of Osteopathic Internal Medicine

# ACO 75 I

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# ACO 75 I



## A Vision for ACOI Post 2020

The ACOI is celebrating 75 years of service as a home for osteopathic internal medicine. What was in 1941 a small cadre of men and women who wanted to increase their knowledge and improve patient care, has grown into today's ACOI, with more than 7,500 physicians, residents and students who share those same goals.

When the AOA announced in February 2014 that it would stop approving graduate medical education programs, the ACOI immediately understood that major challenges would lie ahead for osteopathic internal medicine. The development and nurturing of high-quality internal medicine residency training has been a major focus of the College for all of its 75-year history. Of equal importance, these training programs have been the source of the new members that are the lifeblood of any successful organization.

Given the challenges, the ACOI leadership adopted a strategy of continuous planning to address the challenges ahead. As they have done so, a vision of ACOI's future has begun to emerge. Early in the process, the ACOI Mission statement was revised to put the focus on how the College can support members in the provision of high-quality osteopathic care to patients. The underlying theme of ACOI's strategic efforts is the desire to create a home for those who believe in the patient-centered, osteopathic approach to healthcare.

The ACOI has a plan to address these problems that will require a major financial effort to raise \$750,000 over the short term, but we believe it will be self-sustaining in the long term. We are optimistic that our efforts will be successful, but we must act now. We need your help for the future survival of our profession.

The past two years have been a period of rapid change with many challenges, almost all of which have been created by forces outside of the ACOI's control. An organization's success is determined by how it turns challenges into opportunities. Members of the ACOI should be confident that the leadership of the College is taking the steps needed for the organization—and osteopathic internal medicine—to emerge stronger than before.

*“Support for this campaign is vital for all of our futures as osteopathic internists. The ACOI is working hard to provide stability amidst all of the uncertainty that lies ahead.”*

*Judith A. Lightfoot, DO, FACOI, Past President, ACOI*

## A Plan for Osteopathic Internal Medicine Now and in the Future

The 2017-2018 year is key to our plan's success. Highlights of the plan that is being funded by the 75th Anniversary Campaign include:

- Seeking recognition, from the Accreditation Council for Continuing Medical Education (ACCME) as a provider of CME that qualifies for both AOA and AMA credit, and meets the recertification requirements of both the AOBIM and the ABIM.
- Modernizing ACOI's existing CME offerings and developing new activities that take advantage of advances in technology in order to provide ACOI members with high-quality, easily accessible, inexpensive CME. These efforts will focus on activities that assist members in obtaining and retaining board certification, as well as keeping their medical knowledge current.
- Working collaboratively with other organizations to further ACOI's promotion of high-quality patient care has resulted in ACOI securing an ex officio seat on the ACGME Internal Medicine Residency Review Committee, as well as full participation in the Internal Medicine Education Advisory Board. These interactions provide the ACOI with powerful new partners and allies and afford the College the opportunity to continue to influence internal medicine residency training beyond the transition.
- Continuing to provide hands-on assistance to residency programs as they seek allopathic accreditation, and to encourage them to secure Osteopathic Recognition as they make the transition. This will assure that the distinctive osteopathic philosophy imbued in students during their medical school years will continue during residency.
- Creating a task force to develop and communicate a plan for integrating osteopathic principles and practices into the College's programs, products and services. The task force is charged with developing practical mechanisms for integrating osteopathic principles and practices into the continuum of education.
- Addressing the growing problems of stress, burnout and suicide that are the result of systemic issues affecting physicians today, the ACOI has created a task force on physician wellbeing. Its charge is to identify the problem and its sources, refer members to appropriate resources, and focus on fixing the causes of the problem in collaboration with other groups.
- Strengthening the AOBIM and assuring that its credentials remain viable.

## Why Your Financial Support Is So Critical

ACOI members have a long tradition of giving back to the osteopathic profession and ACOI as trainers, speakers, board and committee members, and mentors to medical students and residents. It is how over our 75-year history the College has been able to fulfill its mission. **The ACOI is the only organization whose sole purpose is to foster the continued success and future growth of osteopathic internal medicine!**

The resources needed to implement our plan are significant. The ACOI will use its reserves prudently and we have allocated \$250,000 to fund this effort, but we are not able to cover all of the anticipated expenses— estimated to be more than one million dollars— through traditional revenue sources. That is why the College has launched a special fundraising campaign as part of the 75th Anniversary Celebration. **Campaign contributions will be put to use to implement our plan, not to support the College's general operations.**

The next 12 months are key to our plan's success. We have had many conversations with osteopathic medical students through our Visiting Professor program and other interactions with the student internal medicine clubs. The message that rings loud and clear from the students is that they are proud to be part of the profession and they want their osteopathic training to continue beyond medical school. With the transition of our training programs to ACGME accreditation by 2020, there is a very real prospect that future students and residents will not be exposed to the distinctive osteopathic approach to care unless we develop a means to provide it to them. **This must be done now, before the GME transition is complete.**

*“We at the American College of Osteopathic Internists are hoping for 75 more years of osteopathic internal medicine with the ACOI as home base. Our vision is to inform and educate, as well as represent and serve our members now and in the future. We need the help of our members to keep these ideals in the forefront, which will help to insure the future of osteopathic internal medicine.”*

*John R. Sutton, DO, FACOI, FACE, CCD, President, ACOI*

## How You Can Make a Difference

**The ACOI launched its most ambitious fundraising effort ever to raise \$750,000 in gifts and multi-year pledges by December 31, 2017. The ACOI is pleased to report that thanks to ACOI members we have raised more than half of our goal as of July 31, 2017.** This campaign is not to build a building or establish a scholarship program, it is to fund a once-in-a-lifetime idea to benefit and preserve osteopathic internal medicine. It requires contributions far greater than those made through dues renewal and conference registrations. For the first time, the College must secure four-, five- and six-figure major gifts and pledges from individuals, medical practices, and institutions to achieve the balance of our \$1,000,000 goal and we are succeeding.

The ACOI is offering a variety of ways that individuals can choose to support the 75th Anniversary Campaign that will allow donors to participate in the campaign without impacting family and personal needs and goals. A number of the gifts highlighted below will benefit the ACOI and offer some possible tax savings to the donor, depending on their age and tax status. The ACOI is offering these examples and scenarios for informational purposes only, not as tax advice. We encourage individuals to seek tax advice specific to their personal situation from their financial advisors. Our campaign counsel is happy to work with members and their advisers on the best ways of making a current gift.

*“It is decision time for our profession. Many of us were mentored by the giants who trained us and are honored and humbled to still have their words fresh in our minds. Some of them faced and overcame obstacles we find hard to imagine today. Now it's our turn to insure the future and enduring legacy of osteopathic internal medicine and our College. We are our profession's future, but must act quickly and generously. Please add your name to the honor roll of ACOI members who support the 75th Anniversary Campaign so we can keep our osteopathic difference strong and secure.”*

*Martin C. Burke, DO, FACOI, President Elect, ACOI  
75th Anniversary Campaign Vice Chair*