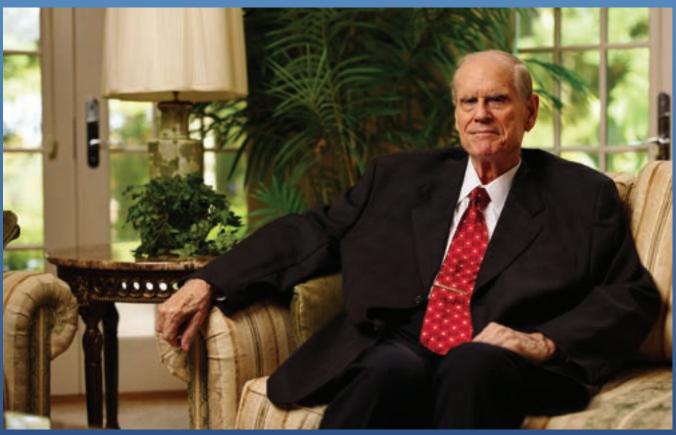
John bookins PLANNING MATTERS

Charitable Giving & Tax Tips

Winter 2022

- your legacy is part of our story



Common Sense and **Uncommon Generosity**

Legacy gifts show appreciation for vision care and important research at the Johns Hopkins Wilmer Eye Institute.

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RESEARCHCORNER



Sarah Szanton, PhD, RN Dean of the School of Nursing, Patricia M. Davidson Professor for Health Equity and Social Justice

LEARN MORE

Dean Szanton is a former health policy advocate and aims her research toward changing policy for older adults and their families. She explores how we can support people who want to age at home in a Hopkins on the Hill at Home webinar: jhu.edu/hopkinsathome.

Aging with independence

s a nurse practitioner, I provided house calls on behalf of Johns Hopkins throughout West Baltimore. I had patients who couldn't get downstairs and had to drop their keys from the second floor for me to find in the grass. I had other people who greeted me on their hands and knees because they couldn't walk around their house. I was there to treat their blood pressure and diabetes. But as I looked into it, I saw that the number one addressable problem for people going to nursing homes was that they couldn't do basic things, like bathing or getting dressed.

We started Community Aging in Place-Advancing Better Living for Elders (CAPABLE) 10 years ago, along with my colleague Laura Gitlin, dean of the College of Nursing and Health Professions at Drexel University, to holistically address these needs. In that time, CAPABLE has served 5,000 people in 45 places across 23 states. The home-based program connects low-income older adults with an occupational therapist, a nurse, and a handyman.

CAPABLE is one of those rare instances in medical initiatives that is completely participant directed. Together, they identify problems and goals what does the person want to be able to do?

CAPABLE focuses on physical function and housing as health, which can include lowering cabinets and repairing holes in the floor to improve safety in the home. These matter more than someone's exact blood pressure level but are almost unaddressed in healthcare. They're also key to health expenditures, particularly in hospitalizations and nursing home admissions. Although what we do is non-medical, it prevents real medical costs — on average \$22,000 of savings for a \$3,000 expenditure.

We're lucky to have a growing population of older adults in our communities. It's an opportunity for our country to learn from their experience. If we can create a baseline of support for everyone to be able to age with independence and dignity, we can unleash so much creativity, mentoring, and wisdom.

COMMON SENSE AND UNCOMMON GENEROSITY

BY JESSICA WILSON, WILMER EYE INSTITUTE

Legacy gifts show appreciation for vision care and important research at the Johns Hopkins Wilmer Eye Institute.

Philip Gerdine's generous legacy gifts will establish two professorships at the Wilmer Eye Institute and a fund to support scholars in precision medicine at the School of Medicine. arjorie Wells Gerdine was a clinical psychologist known for her common sense, says her husband Philip Van Horn Gerdine. "She was not to be trivialized."

While Marjorie passed away in 2019, her influence remains large in his life and his legacy, which includes two professorships at the Wilmer Eye Institute made available as part of his estate plan. Both are named the Philip and Marjorie Gerdine Professorship of Ophthalmology. One is for the Cornea Division and one is for age-related macular degeneration research.



Also part of his estate plan will be the Philip and Marjorie Gerdine Precision Medicine Scholars Fund at the Johns Hopkins University School of Medicine.

Philip has a connection to Johns Hopkins through his grandfather, Lynn Van Horn Gerdine, who was Class of 1895 at Johns Hopkins University and eventually became a psychiatrist. His grandfather's career inspired Philip to study clinical psychology, which both he and Marjorie studied in Boston. In the 1980s, he and Marjorie were living in Boston where Philip sought treatment for his eye condition and encountered Oliver Schein, MD, MPH, for the first time. Schein treated Philip for about half a year but then left to join the Wilmer Eye Institute at Johns Hopkins Medicine in Baltimore.

Because of Philip's respect for Johns Hopkins, thanks to his grandfather's educational experience as well as the progress he had made under Schein's care, Philip chose to continue his treatment at the Wilmer Eye Institute.

"I followed Oliver Schein down there because I knew he was an continued on next page continued from page 3

COMMON SENSE AND UNCOMMON GENEROSITY

expert in corneal disease and this particular one." The disease in question, Fuchs' dystrophy, affects the cornea — the clear front part of the eye — by causing the layer of cells responsible for maintain-

ing proper fluid levels in the cornea to deteriorate and tiny bumps to form on the back of the cornea. When enough of these cells die, fluid builds up in the cornea, resulting in swelling and blurred vision.

Schein, now Wilmer's Burton E. Grossman Professor of Ophthalmology, eventually performed corneal transplants on Philip to treat his Fuchs' dystrophy, which were a success. Philip recalls regaining clear vision again.

"You discover the world really does exist and it's not a big blur. And as you improve, you're able to do things and deliver services and all the rest again," he says.

These services, in his case, included traveling the world — to every continent except Antarctica — to fix companies. Both Philip and Marjorie began their careers as clinical psychologists. Marjorie remained one throughout her professional career, maintaining a large private practice in Massachusetts working with children and adolescents. On the advice of Marjorie, however, Philip transitioned into business. As evidence for her point, she reminded him that he had built radio station WDHA-FM in New Jersey just before going to study psychology in Boston. "The famous statement from my wife was, 'You don't belong in psychology. You belong in business.' I got quite angry and then thought that over. She then said, 'Here's a Harvard Business School application

"When my wife and I worked on our wills, we knew that Johns Hopkins Medicine would be at the top for gift giving. And it's a thank-you for Baltimore being what it is – a semi-Southern town with kind people."

— PHILIP GERDINE

filled out.' And she was right."

After business school, Philip worked as a business consultant in mergers and acquisitions. "My whole life, I've been fixing things. Which is part of psychiatry and psychology but now it's fixing businesses."

Decades after Philip's corneal transplants, Marjorie was treated for age-related macular degeneration at Wilmer. Both underwent treatment in other departments of Johns Hopkins Medicine, as well.

"When my wife and I worked on our wills, we knew that Johns Hopkins Medicine would be at the top for gift giving," says Philip. "It's a

thank-you for what [Hopkins] did for Marjorie and me. We have gotten to know the doctors there well. And it's a thank-you for Baltimore being what it is a semi-Southern town with kind people."

"We are grateful that Dr. Gerdine has chosen to invest in innovation within the field of ophthalmology and research into eye disease," says Wilmer Director Peter J. McDonnell, MD. "The professorships he is establishing will accelerate the work of the next generation of Wilmer faculty, leading the way to better understanding and treatment of the major retinal and corneal diseases."

THEIR**LEGACY**TOLD

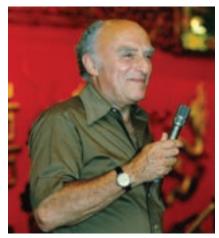
Gertrude Raab Bengtson

received her diploma from the Johns Hopkins School of Nursing (SON) in 1945. In addition to supporting the school with charitable gift annuities, she left a gift from her estate to support an endowed scholarship and to name a classroom in SON's renovated building. This past April, 11 grants were awarded to



Gertrude Raab Bengtson left a legacy for School of Nursing students and faculty.

SON faculty, postdoctoral fellows, and pre-doctoral students through the Discovery and Innovation Fund, which was funded in part by Gertrude's generosity. Her husband, John, who passed away in 1996, also left a gift for SON.



When he wasn't traveling, SAIS alumnus Bill Koplowitz was singing in and directing a capella groups.

Wilfred "Bill" Koplowitz graduated from Johns Hopkins School of Advanced International Studies (SAIS) in 1949, and his involvement in and love for the school endured. As a highly engaged advocate, volunteer, and partner with the alumni relations office, he attended alumni events in New York City, Berlin, Amsterdam, and London. His affinity for SAIS, and for education as a whole, inspired him to leave a gift from his estate to SAIS. His SAIS education paved the way for future accomplishments, from serving as an operations officer for the CIA to joining Citicorp as director of International Global Public Affairs. A lifelong learner, Bill taught at the National War College and published a catalog of higher education courses on intelligence.

Judy Walker Renick and her husband Coleman made San Antonio, Texas, their home after Coleman's success in the oil industry. A dedicated volunteer and avid reader, Judy devoted her time to the Hemphill County Library and San Antonio Library Foundation, as well as to I Care San Antonio, a nonprofit committed to providing eye care to those in need.



Judy Walker Renick volunteered for several local organizations, providing support for libraries and eye care

She also made a generous gift from her estate to support research in macular degeneration at the Johns Hopkins Wilmer Eye Institute.

CAMPUS **TRANSFORMATION** IS **UNDERWAY**

Johns Hopkins University kicks off two major construction projects at its Homewood campus in Baltimore. ohns Hopkins broke ground on two major Homewood campus construction projects this fall — the Hopkins Student Center (HSC) on the east side of campus and the Stavros Niarchos Foundation (SNF) Agora Institute building on the west side.

"This is an exciting and uniquely transformative time for our campus and our community," says Bob McLean, vice president for facilities and real estate at Johns Hopkins. "These projects not only represent the future of Johns Hopkins but also its commitment to creating spaces that foster collaboration, inclusion, and exploration."

The new student center is being designed by Bjarke Ingels Group with interior architecture by the Rockwell Group, Shepley Bulfinch as architect of record, and Clark Construction as construction manager.

The HSC will be situated at a campus crossroads, providing a welcoming, vibrant entry point along N. Charles Street at the east edge of campus. Within a sprawling, multitiered interior comprising approximately 150,000 square feet, the student center will include spaces for co-curricular arts programs, student resources and support services, a student engagement hub designed for use by the university's more than 400 student organizations, several flexible multipurpose spaces, lounges, and a variety of dining options. The building is expected to open in fall 2024.

The SNF Agora Institute building, designed by architecture firm Renzo Piano Building Workshop with architect of record Ayers Saint Gross, will feature two "floating" glass cubes. One will include a café and space for public gatherings and the other, offices, labs, classrooms, meeting and seminar rooms, and open work spaces. The institute's home will be located on Wyman Park Drive, a site that provides visibility, proximity to students and faculty, and accessibility for the community for events and other public forums. Consigli Construction Co. Inc. is the construction manager, and the project is expected to be completed by fall 2023.

Meanwhile, other campus transformations continue, including the recently remodeled Ralph S. O'Connor Center for Recreation and Well-Being, which opened in fall 2021. It includes new and expanded spaces for weight training, cardio, and group fitness classes.

RENDERING COURTESY OF RENZO PIANO BUILDING WORKSHOP AND ARCHITECT OF RECORD AYERS SAINT GROSS

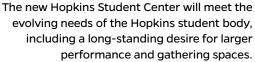


The SNF Agora Institute building will feature two "floating" glass cubes, including a café and space for public gatherings.



"We are looking forward to providing an open and welcoming space that fosters the kinds of conversations and convenings that are at the very heart of SNF Agora's mission — and that are fundamental to democracy itself."

> HAHRIE HAN DIRECTOR, SNF AGORA INSTITUTE



The 150,000-square-foot Hopkins Student Center will include spaces for co-curricular arts programs, student resources and support services, a student engagement hub, several flexible multipurpose spaces designed for use by JHU's more than 400 student organizations, and a variety of dining options.



Q&A **ROBERT MISBIN** A new gift to Peabody's Tuned-In program seeks to diversify America's orchestras

BY ELENA CONWAY

lassical music has always been in Robert Misbin's, Med '71 (MD), life. Even while attending Johns Hopkins University School of Medicine, he would visit the nearby Peabody Institute years before it became affiliated with the university in 1977. And in retirement, Misbin dedicates part of his time to classical music and opera. He cofounded Partners for the Arts, an organization that supports young opera singers, and helped establish a chamber music competition at Levine Music in the D.C. area.

This year, Misbin expanded his support to Baltimore. With an outright gift and a commitment from his estate plan, he formed the Misbin New Directions Ensemble for Peabody Preparatory's Tuned-In program, which provides Baltimore City students with free musical education. We spoke with him to learn the story behind this gift.

What role has classical music played in your life?

Music has been an enormous source of enrichment from the very beginning. My parents loved opera. My mother let me use her record collection. I would play them on my own and, of course, being a child, I broke some of them. My parents put them back together with scotch tape. As the records went around on the turntable, I would hear the *bump*, *bump*, *bump* of the needle hitting the tape.

What inspired your gift to Peabody's Tuned-In program?

My daughter lives in Chicago and got me involved with the Chicago Metamorphosis Orchestra Program (ChiMOP), which provides instruments and music instruction to inner-city children there. Last year, I decided to expand my commitment. I asked ChiMOP's director, Tom Madeja, what other organizations around the country he thought I might be interested in. He said that Peabody's Tuned-In program was actually the model they used to develop the ChiMOP.

This year happens to be the 50th anniversary of my graduation from Hopkins and the hundredth-year anniversary of the discovery of insulin, which has been the focus of my scientific career, starting from when I was a medical student at Hopkins. Last year I published *INSULIN – History from an FDA Insider*. So now, in 2021, it felt like the stars were in alignment, pointing for me to start a new and important program.

Why did you focus on a string program?

I asked Dan Trahey, one of the founders of Tuned-In, 'What do you want to do that you're not doing now?' Dan is a tuba player in classical music and jazz; I expected he wanted to do something along those lines. But he wanted to develop a string program, which really surprised me. He asked if I could think of any people of color who are major string players in classical music. And I admitted that I couldn't.

The thought had occurred to me before. I was once a timekeeper for the Washington Performing Arts Society's string competition. It's for young musicians, often with tremendous talent, and it struck me that there were hardly any African American children playing string instruments. This is not the case in opera and in many other forms of American music. Dan felt that a string program would really make a tremendous difference in that regard in the Baltimore community.

What do you hope your gift does for Peabody?

By making an estate gift, I've made the commitment for the New Directions Ensemble to go on in perpetuity. The hope is to foster talent in string playing that might not have blossomed otherwise in Baltimore. But the impact goes beyond string playing and even beyond the music itself. I think that there is real value in learning how to play an instrument, regardless of the kind of music you play and regardless of how good you are. Playing sports is recognized for its importance in developing discipline. Music instruction has the same effect. The goal is to give young musicians a sense of self-worth, and to teach them to understand what excellence is and how you can achieve great things by working with other people.

It makes a tremendous difference to be able to develop that talent in children who may have been disadvantaged in other aspects of life. It's a way of giving back to the community.



Robert Misbin's passion for opera has led to his support of programs for young musicians in Baltimore, as well as the creation of his own opera, "Briscula the Magician."

MAKING NEWS

HUB from the Johns Hopkins news network

The HUB is the news center for all the diverse activity going on at Johns Hopkins. To see what's new, important, and just worth sharing, visit hub.jhu.edu.



Ashani Weeraratna, Nilofer Azad, Lisa Cooper

Three Hopkins researchers were appointed by President Biden to serve on national advisory boards. Ashani Weeraratna, who specializes in melanoma and the effects of aging on cancer, and Nilofer Azad, whose research focuses on developing new drug combinations for patients with advanced cancer, are members of the National Cancer Advisory Board. Lisa Cooper, a pioneering public health disparities researcher, general internist, and professor, was appointed to the President's Council of Advisors on Science and Technology.



Members of the Johns Hopkins Class of 2025 came together for a distanced close-up this past fall, bringing back

an orientation tradition after a oneyear, pandemic-necessitated hiatus. Nearly 1,400 new students congregated on Keyser Quad for the class photo, snapped from the Gilman Hall clock tower. The talented class of students includes a developer of an electric car and bamboo bike, a researcher on underwater robot archaeology, and a founder of a malaria youth intervention program in Ghana.



Johns Hopkins University President Ron Daniels has authored a new book that critically examines how universities sustain and support democracy. The book, *What Universities Owe Democracy*, is published by the Johns Hopkins University Press and was released in October. In it Daniels, who teaches undergraduate courses on the relationship between universities and democracy, explores the ways in which universities support democracies and key actions they must consider to strengthen their standing as core democratic institutions.

a note from the SENIORDIRECTOR

hen people think of gift planning, things like wills and estate planning often come to mind. For many donors, making a gift after their lifetime is one of the most meaningful ways they can give back to Johns Hopkins University and Medicine. Here in the Office of Gift Planning, our team consults on all types of gifts. We partner with you to make sure your philanthropic wishes complement your financial goals, whether you wish to make a gift to support Johns Hopkins' future or an impact now. Here are some options that also give back to you:

Appreciated stock: Consider donating shares of stock that are worth more today than when you purchased them directly to Johns Hopkins. You'll receive an immediate income tax deduction on the fair market value of your stock gift and avoid capital gains tax.

Tax-free IRA distribution: Transferring assets directly from a traditional IRA to Johns Hopkins is an easy way to make an immediate impact. If you're $70\frac{1}{2}$ or older, you're able to make a tax-free gift of up to \$100,000 directly from your traditional IRA to Johns Hopkins. If you're 72 or older, you can also satisfy your required minimum distribution.

A gift that pays you income: With a gift of \$10,000 or more, establish a gift annuity or trust arrangement that will pay you and/or a loved one income for life, while providing for Johns Hopkins after your lifetime. You're also eligible for a charitable income tax deduction.

We look forward to hearing from you to discuss your year-end giving plans. Contact us at 410-516-7954, email giftplanning@jhu.edu, or visit giving.jhu.edu/giftplanning. All of us in the Office of Gift Planning wish you a happy and healthy New Year.

Anne B. Doyle, JD Senior Director Johns Hopkins Office of Gift Planning



Anne Doyle leads the Office of Gift Planning team at Johns Hopkins University and Medicine.



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