

# BRIGHTER FUTURES

**UAB DENTISTRY**  
LEADING ORAL HEALTH CARE

A FINANCIAL AND CHARITABLE PLANNING GUIDE

WINTER 2018

## Alumnus Paul Weeks 'Honored to Give' \$500,000

Dr. Paul R. Weeks, Sr. has taken the first step to endow a professorship to benefit the UAB School of Dentistry's Department of Periodontology. The Huntsville, Ala. periodontist is making a total gift of \$500,000 that includes current giving and estate giving.



### Support What Matters Most to You

*Like Dr. Weeks, you can make a meaningful gift to support UAB in the future. Contact us to learn about the variety of ways you can make an impact.*

Weeks graduated from the UAB School of Dentistry in 1977 and completed the periodontics post-graduate program at UAB in 1979. He said the school and the Department of Periodontology have come a long way since he attended.

"My two-year residency gave me the valuable skills I needed to start my own practice and to continue the ongoing educational process. The program gave me an excellent base to springboard from," he says.

Weeks has provided leadership to several dental organizations during his 38-year career. He served several terms on the UAB Dentistry Leadership Council, the school's fundraising and advisory board. Through his service on the Leadership Council and previous service as a part-time clinical instructor at the School of Dentistry, he said he was keenly aware of the need to endow a faculty position.

"I have been blessed with an excellent education, which has enabled me to provide optimal care for my patients," he says. "I am glad to give back and keep our school among the best in the country. That's what the citizens of Alabama and the dental students and residents deserve."

He has been involved with prior fundraising campaigns to help the school, including the Weatherford-Palcanis Endowed Professorship in periodontology. He said he hopes other alumni will acknowledge the importance of having an excellent faculty and contribute to similar efforts. "I know they realize how much the UAB School of Dentistry has done for us. Now, more than ever, the school needs our assistance. I would like to challenge our alumni, especially older alumni like myself, to step up and make a gift. They might also consider leaving something from their estate," he says.

Although he has worked hard for nearly four decades, Weeks still finds time to enjoy life outside of dentistry. He enjoys traveling with his wife, Alicia, and enjoys cycling, fishing, hiking and snow skiing.

When asked to reflect on his time as a dental student and resident, Weeks admits, "it wasn't all roses and it wasn't easy," but he says he's honored to give back to UAB and give future students and residents the same opportunity he had. He wants others from his generation to know that the school doesn't receive the state funding it once did. "Hopefully others will follow in my footsteps and give back. It is an honor to give to my school."

# Estate Planning in 60 Minutes

Have you put off creating your will because it seems too overwhelming? It may be easier and less time-consuming than you think. In just a one-hour meeting with an estate planning attorney—along with some preparation—you can be well on your way to having a legally sound will.

First, contact an estate planning attorney. These legal specialists are experts in will planning. They understand how your decisions affect your estate and can guide you toward a path that will best meet your goals.

## From Start to Finish

Here's how you and your attorney will progress from **nothing to something** in just one hour.



### WHAT ARE YOUR GOALS?

In the beginning, expect to answer a lot of questions regarding your goals for your estate. For example: How do you want to provide for minor children? Do you want to give back to your community?



### ASSETS AND LIABILITIES

Discussing your assets and liabilities, as well as how they are titled, will help your attorney determine whether your current situation aligns with your estate goals.



### ADDITIONAL CONSIDERATIONS

You'll discuss guardianship for minor children, an executor for your estate, medical considerations and other important issues.



### NEXT STEPS

Assuming the meeting goes as planned, at this point your attorney should have a good feel for your estate and be ready to draft your will. Once a draft is complete and agreed upon, you'll meet again to execute the will.\*

*\*More complex estates or living trusts may require additional meetings and documentation.*



## Make the Most of Your Time

To maximize your meeting, be prepared to discuss the following:

- Background information (address, marital status, name of children, etc.)
- Assets and liabilities
- Guardians for minor children
- Executor for your estate
- Special considerations such as medical concerns or prenuptial agreements

# You Can Give *and* Receive

It's not easy choosing the perfect gift, especially when it comes to charitable giving from your estate. When to give, how much to give and the affordability of giving are common concerns. And then there's the choice about **how you want the gift to benefit you.**

Whether you aim to enjoy tax savings or maintain your current lifestyle, there's a charitable gift that meets your needs. Use the chart below to navigate these advantages and find the perfect gift—one that benefits you and makes a significant impact on those we serve.



IF YOU WANT TO...

OR

Make a larger gift now or in the future that has little or no effect on cash flow, and:

- Qualify for an income tax charitable deduction
- Avoid taxes on assets that have increased in value
- Transfer the expense of insuring or maintaining assets you no longer need

Make a simple gift after your lifetime, and:

- Maintain your current lifestyle by controlling your assets during your lifetime
- Enjoy the flexibility to change plans
- Pass your retirement plan assets to us tax free

CHOOSE FROM THESE OPTIONS...

OR

Stock or other securities  
Real estate  
Personal property

Gift in your will or trust  
Beneficiary designation

THEN ENJOY THE **TRUE REWARD!**

Feel good knowing that you've created a brighter future for those we serve.

## GET ORGANIZED

Provide a road map for your loved ones with where they can find key documents and whom to contact in case of your absence. Send for the **FREE** organizer tool **Your Guide to Locating Important Documents** using the enclosed reply card today!



# Putting Family FIRST

Naming the UAB School of Dentistry as a beneficiary in your will is a simple way to enable the future of our important work. But maybe you've hesitated because you're unsure about how much to give.

Because life is unpredictable and the value of your assets is likely to rise and fall, you don't want to risk that someday your charitable gift could outweigh the well-being of your family. Fortunately, there's a solution.

## Percentage Giving

Instead of a fixed amount, consider gifting a percentage of your estate or of specific assets. That way, gifts to loved ones and to organizations such as ours remain proportional—no matter how your estate fluctuates.



### Every Gift Counts!

*Even a small percentage of your estate makes a big impact on us. Contact us to learn more about supporting those we serve while putting family first.*



Here are three simple ways to put family first while supporting those we serve:

- 1 Gift a percentage of your estate to us in your will.
- 2 Leave us a percentage of your residual estate (the portion of your estate that remains after all gifts have been made and all claims of the estate are satisfied).
- 3 Name us as a beneficiary of a percentage of your life insurance policy or retirement account.

## Your Next Steps

1

**RETURN** the enclosed reply card to get your FREE guide ***Your Guide to Locating Important Documents*** so loved ones can identify and locate important papers after I'm gone.

2

**BROWSE** our website to learn about various ways you can make a difference today and in the future.

3

**CONTACT US** to get started and let us help you maximize your impact and leave a lasting legacy.

## UAB DENTISTRY

LEADING ORAL HEALTH CARE

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