

SOUTHWESTERN NEWS

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NEW PLANNED GIVING DIRECTOR TO HELP DONORS SORT THROUGH MAZE OF CHARITABLE OPTIONS

DALLAS – August 24, 2000 – When philanthropists – whether wealthy or of modest means – decide to leave a lasting gift for the benefit of UT Southwestern Medical Center at Dallas, they can find themselves overwhelmed by the countless options and technicalities. Giving, even when inspired by the simplest idea, is complicated business — a fact that Southwestern Medical Foundation knows all too well.

Recognizing a growing need for an expert to help philanthropists sort through the seemingly endless opportunities for giving, the medical center and the foundation have recruited a specialist to assist donors with planned gifts. Randy Daugherty, a veteran of development in Dallas, has been appointed planned giving director at Southwestern Medical Foundation. Daugherty will assist in launching a joint planned giving program between UT Southwestern and the foundation and will guide donors through the choices offered in planned-giving programs.

"It was becoming increasingly evident that both the medical center and the foundation needed a planned-giving expert on whom we could rely on a day-in, day-out basis," said Michael Meadows, executive vice president of public affairs at the foundation. "Our donors deserve the assistance of someone like Randy Daugherty, who can give them sound, accurate advice. We want donors to feel good about the decisions they make, and Randy can help give them the tools needed to make informed choices."

When it comes to planned giving, those choices (and their benefits) are complex and many. From straight-forward bequests to gifts of real estate, stock, personal property and life insurance, planned gifts often require donors to seek financial and legal advice. Before visiting

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with their accountant, attorney or other advisor, UT Southwestern donors will now be able to consult Daugherty, who can help them better understand their charitable options, while saving them time and money in their search for more information.

By choosing to donate through the foundation's Planned Giving Program, donors not only receive the personal satisfaction of supporting UT Southwestern's medical education, research and patient-care efforts, they also are eligible for a long list of financial benefits.

"My major role will be to educate," said Daugherty, who has previously served as director of development and planned giving at the Dallas Museum of Art and director of major gifts and planned giving at Southern Methodist University. "It doesn't take a fortune to make a gift of significance -- even donors with relatively modest estates can make wonderful gifts to benefit the medical center. People just need help seeing the big picture as they weigh their options. It will be a pleasure to help UT Southwestern philanthropists explore the possibilities of giving."

Sid Mallory, vice president for development at UT Southwestern, said, "Everyone will benefit from this new addition to our development staff. Our donors will be better served as they delve into the prospect of giving, and the medical center will benefit tremendously from the strength Randy Daugherty brings to the Planned Giving Program."

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