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Introduction & Overview

Dear Class Agent,

Harvard Medical School attracts and produces some of the best and brightest minds in the world. This is made possible, in large part, by the steadfast commitment and support of you, our Class Agent volunteers. You help to shape the unique learning experience for students by helping to raise critical funds for everything from scholarships and financial aid to innovative research programs and world-class faculty. Simply put, you help HMS remain the premier medical school in the country and, for that, the School is forever grateful.

I hope this manual serves as a useful reference when speaking with your classmates. As always, please do not hesitate to contact us should you have any questions or need further assistance.

Thank you again for all that you have done and continue to do for HMS.

Sincerely,

[Signature]

Shaké
Senior Director of Annual Giving

Staff Contacts

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Introduction & Overview

HMS Mission
To create and nurture a diverse community of the best people committed to leadership in alleviating human suffering caused by disease.

Harvard Medical School Alumni Fund Mission
To secure annual unrestricted gifts in support of student scholarship.

“As HMS alumni, the best way for you to support our medical students and ensure their success as tomorrow’s medical leaders is to make an annual gift to the Alumni Fund.”
—Jeffrey S. Flier, M.D.
Dean of the Faculty of Medicine

What is the Harvard Medical Alumni Fund?
Created in 1951, the Alumni Fund is a specific fund to which alumni are encouraged to give each year. Because it is a fund of unrestricted money, the Dean continues to designate 100% of contributions for scholarship support. Students may struggle with many costs apart from tuition. To relieve a portion of this burden ensures that they focus the majority of their energies on education and excellence rather than on how to make ends meet.

Tuition for the 2012-2013 academic year for the first-year class is $49,875, bringing the average cost for an unmarried first-year student to $73,000 (including living expenses). The School does its best to make an HMS education affordable, but for many, scholarship is critical. The Alumni Fund provides the funds to close this gap between support from the School and what each student can do to finance his or her education. Each year, Harvard Medical School alumni provide the single largest source of new scholarship money for HMS students.
Class Agent Job Description

The Class Agent is responsible for providing leadership for the fundraising efforts of his or her class each year. Representing over 65 classes, 83 Class Agents solicited over 9,000 alumni in Fiscal Year 2012. As a Class Agent, your personal dedication, enthusiasm, and gift contributions play a vital role in keeping your classmates connected with the School and encouraging their annual support of HMS students.

Responsibilities

- Make a significant financial contribution to the Harvard Medical School Alumni Fund each year. Your own generosity is the best preparation for seeking equally generous and thoughtful gifts from others. Your gift will serve as example for others to follow.

- At minimum, compose one personalized Class Agent letter to your classmates each fall. While not required, it is strongly recommended that you also write one—even if primarily to thank those who have already given—in the spring. Annual Giving staff will prepare a draft of the letter you provide for each of your classmates, which will be returned to you for personalization. After you have personalized each letter to your satisfaction, Annual Giving staff will distribute the letters to your classmates.

- Attend Class Agent meetings to develop ideas, share progress, and receive updates from Annual Giving Staff.

- Attend (schedule permitting) and encourage attendance of Alumni Week activities and Class Reunions.

- In Milestone Reunion years, participate in the fundraising efforts of your class reunion committee.

- Remain in communication with Annual Giving Staff about progress with your classmates, questions or concerns about your role as a Class Agent, and ideas for more effective class solicitation.

- Assist Annual Giving Staff in identifying members of your class who may have the capacity to make a major gift. While it is not required, you are certainly encouraged and invited to accompany major gift officers when they visit potential donors in your class.

- Help in thanking classmates who have made gifts through thank you notes, personal phone calls, or e-mails.
Class Agent Participation Timeline

Fall Activities
August–September
• Receive your Fall Class Agent Welcome Packet from Annual Giving.

September–October
• Attend Class Agent Meeting
• Draft your Class Agent letter and send it to Annual Giving for production.
• Once Annual Giving returns your batch of prepared letters, sign and personalize each one.
• Return your signed letters to Annual Giving for distribution to your classmates within two weeks.

November
• Participate in quarterly Class Agent Conference call.

Spring Activities
January–February
• Participate in Mid-Year Conference Call in January
• Receive your Spring Class Agent Welcome Packet from Annual Giving.

February–July
• Draft your Class Agent letter and send it to Annual Giving for production.
• Once Annual Giving returns your batch of prepared letters, sign and personalize each one.
• Return your signed letters to Annual Giving for distribution to your classmates within two weeks.
• Participate in quarterly Class Agent Conference Call in April.
Harvard Medical School by the Numbers

Class of 2016
Harvard Medical School is committed to the enrollment of a diverse body of talented students.
- 5,804 students applied for the 165 available positions for the Class of 2016.
- First-year students come from 29 states and 9 foreign countries.
- The Class of 2016 represents 71 undergraduate colleges and universities.
- 25 first-year students have graduate degrees, 23 Master’s, and 2 PhD.
- Members of the class range in age from 20 to 31 years old.
- Tuition for the 2012-2013 academic year for the first-year class is $49,875, bringing the average cost for an unmarried first-year student to $73,000 (including living expenses).

Financial Aid
At HMS, financial aid is need-based only, meaning that application for financial assistance is completely separate from the application for admission. HMS initially grants students a package of loans called the “unit loan,” and then only students whose financial need exceeds the amount of the loan are eligible for scholarship aid from the School. Ex: For 2012-2013, the unit loan for incoming students is $26,950.
- In Fiscal Year 2011, the HMS Office of Financial Aid awarded $13.5 million in need-based scholarship support, with an average scholarship of $36,250
- 82% of the student body (552 of 675 medical students) received financial assistance last year
- The average debt for the Class of 2011 was $104,890, ranging from $10,230 to $235,023 (Note: student debt includes the cumulative undergraduate, graduate and medical school debt). The medical school-only debt was $97,735.

Alumni Giving in Fiscal Year 2011
We thank our donors for continuing to make Harvard Medical School a philanthropic priority and for making this a community that believes in and supports the next generation of medical students, researchers, and scientists
- 33% of alumni gave to HMS in Fiscal Year 2012
- More than $2.38 million was contributed by alumni, through the Alumni Fund and the Auditorium Chairs program, to support immediate-use student scholarships—this is the equivalent to the income stream of a $64 million endowment
- 426 alumni joined the Dean’s Council, the Medical School’s leadership annual giving society, by making gift of $2,000 or more ($500 or more for Recent Graduates)
- 787 alumni increased their gifts to the Alumni Fund
- 15 classes had a donor participation rate of 50% or higher
Crafting your Class Agent Letters

Personalized bi-annual Class Agent letters are the primary method through which you will solicit your classmates for Alumni Fund gifts. These letters are a vital part of our fundraising efforts each year, as many HMS alumni have reported that the letters they receive from you, their Class Agent, make a world of difference in the level of connection they feel with Harvard Medical School and their subsequent giving. Your efforts dramatically increase your bond with your classmates, promote their participation, and ultimately yield fundraising results from your class.

When composing your letters:

• Make your own gift first and consider mentioning that you have done so; your leadership and commitment will make it easier to ask others to do the same.

• Review all materials included in the Class Agent Welcome Packet you receive from Annual Giving each fall and spring. It will include current news and events pertaining to HMS that you might consider including in your letter.

• Candidly express your own motives for supporting student scholarship and contributing to the Alumni Fund.

• Update your classmates with as much personal news and news of other classmates as you are comfortable sharing – it is often these personal touches that make Class Agent letters so enjoyable to receive!

• Consider using the postscript of your letter as an opportunity to write a personal note on each and every classmate’s letter, even if it is just a few words—it makes a big difference!

• Feel free to cross out formal first names and write in informal names or nicknames on your letters.

• Use the HMS note cards that you receive with your prepared letters to give special recognition to classmates who have been particularly generous.

• While not obligatory, we encourage you to meet, call or write your classmates as often as possible. This highly personalized approach will ensure greater success.
Gifts and Recognition

There are many ways to give to Harvard Medical School. Below are some options that you and your classmates might consider.

**Annual Gifts**
Annual gifts strengthen the Medical School’s ability to help students achieve their potential and maintain its standing as the premier medical school in the country. Every gift makes a difference and the most common Annual gifts are made to the HMS Alumni Fund. Together, donors to the Alumni Fund have an important impact as they help to shape the experience for nearly every HMS students by providing scholarships and financial aid, and teaching innovations through their annual giving.

**Stretch Gifts**
Stretch gifts are termed as such because they encourage donors to reach beyond their normal giving capacity to make a significant contribution. HMS asks alumni to make stretch gifts during their Reunions, but anyone can make a stretch gift anytime they feel inclined. While the timing still mirrors the HMS fiscal year, donors may fulfill their pledge of $5,000 or more over the course of three years.

**Major Gifts**
Major gifts come in many different forms as people give to HMS for a variety of personal reasons. Fellow alumni, like you, often want to give back to the Medical School for the impact it has had on their lives and careers, or because they want to make a difference—in a student’s life, in a program, or through supporting Dean Flier’s goals. Whatever the reason, donors want to see their gifts make a significant contribution, and the ORD staff is here to help maximize the potential of every gift.

**Planned Gifts**
These encompass a way of giving that helps donors balance their personal financial goals and charitable interests while realizing significant tax benefits.

*Life Income Gifts:* In this arrangement, a donor irrevocably contributes cash, appreciated securities, or other property to HMS. The Harvard Management Company (HMC) then manages that donation and pays the donor or a beneficiary an annual income for life or a specified term of years. After the death of the last beneficiary or the term’s end, the remainder of the donor’s gift is transferred to HMS. The proceeds of the donor’s gift are used for the purposes he or she designated at the time of his or her contribution.

**Benefits include:**
- Annual income for a donor and/or a beneficiary.
- Professional investment management at no charge by the HMC.
- Favored capital gains tax treatment.
- Immediate federal income tax charitable deduction.
- Estate tax savings.
- Creating a future gift that reflects a donor’s vision for HMS.
Gifts and Recognition

Charitable Gift Annuity: A charitable gift annuity is a simple contract between a donor and Harvard Medical School: in exchange for an irrevocable gift, Harvard will pay the donor an annual fixed income for life. The annuity is backed by the assets of the University, and up to two individuals may receive income for life. In addition to receiving a guaranteed income, the donor is eligible for a charitable income tax deduction, and may also name the area at Harvard Medical School that will ultimately receive the benefit of his or her gift.

Pooled Income Fund: Similar to mutual funds, gifts to one of Harvard’s pooled income funds entitle the donor and any beneficiary he or she names to a pro-rated share of the fund’s income for life, in addition to an income tax deduction.

Charitable Remainder Unitrust: A Harvard-managed charitable remainder unitrust is an excellent way to generate variable lifetime income for the donor (and another person, if named). The donor will qualify for a charitable income tax deduction for a portion of the value of his or her gift. If the donor funds a unitrust with an appreciated asset—such as stock—he or she can entirely avoid the capital gains tax which otherwise would be due had the asset been sold outright. Harvard Management Company will manage the trust at no additional cost to the donor. The minimum funding level is $100,000. The donor can add to the unitrust at any time with a minimum gift of $10,000. HMC can invest the trust in units of the Harvard endowment. Alternatively, the trust can be invested in a group of mutual funds for a tax efficient income.

Charitable Lead Trust: Once a donor transfers assets to a lead trust, the trust pays a percentage of its value to Harvard Medical School each year of its term for purposes designated by the donor. When the trust ends, its remaining principal passes to the donor’s family.
Other popular planned gifts:

**Bequests:** A charitable bequest allows donors to give various assets to HMS through a provision in their wills or estate plans. The bequest is deductible for federal estate tax purposes and, in general, bequests are not subject to state inheritance or estate taxes. The HMS Gift Planning Office will happily provide sample language for your will or estate plan.

**Retirement Gifts:** By naming HMS the beneficiary of a retirement account or percentage thereof, it passes to HMS taxfree. This contrasts with upwards of 75% of the plan’s assets being lost to taxes if left to a donor’s children. Changing your IRA designation to name HMS as a beneficiary often requires little more than filing paperwork with the plan custodian. The HMS Gift Planning Office will happily provide further information.

**Personal Property:** In planning a donor’s estate, it is important that he or she remember that property including works of art, antiques, stamp and coin collections, and jewelry may be subject to estate taxes. Should a donor wish to donate this type of property to Harvard Medical School during his or her lifetime, he or she may reduce his or her taxable estate, as well as qualify for an income tax deduction.

**Real Estate:** A gift of real estate can be an attractive way to make a substantial commitment to Harvard Medical School while realizing important tax and income benefits. A donor may be able to significantly reduce his or her income taxes, capital gains taxes, and estate taxes, while possibly earning an income from his or her gift. Types of real estate that can be suitable for a gift include: a personal residence, vacation home, farm or ranch, commercial property, building lot, agricultural land, and undeveloped or unimproved land.
Donor Recognition Societies

Dean’s Council benefits include:

- Invitations to exclusive Dean’s Council events
- Recognition in the Honor Roll of Donors
- Dean’s Council lapel pin

Dean’s Council

Over twenty years ago, Harvard Medical School established the Dean’s Council Gift Society to recognize the importance of alumni and friends of the School who make an annual commitment of $2,000 or more during the fiscal year. The advocacy of these individuals dramatically helps to advance the mission of Harvard Medical School, making it possible to educate the leading doctors of tomorrow and sustain groundbreaking research today. Every gift adds value and provides the Dean flexibility to champion areas of greatest need—most notably, scholarship support.

Each year, the Medical School honors its Dean’s Council members by publishing their gifts in the annual Honor Roll of Donors, holding elegant receptions in their honor, and hosting dinners throughout the country in celebration of their generous support.

To learn more about becoming a member of the Dean’s Council, please contact Shaké Sulikyan, Senior Director of Annual Giving, at 617-384-8454 or shake_sulikyan@hms.harvard.edu

Ezekiel Hersey Council

In 1772, Ezekiel Hersey made a bequest of £1,000, which led to the establishment of Harvard Medical School. Through his single generous act of giving, he helped found a medical school that would one day become world-renowned for its physicians, researchers, and medical leaders. He left a truly remarkable legacy. In so doing, he not only became the Medical School’s first benefactor, he also became its first “planned” giver.

Today, alumni and friends who make a bequest provision or other life income gift to HMS become members of the Ezekiel Hersey Council. Members receive an invitation to the Council’s annual spring dinner at the Medical School, information on current research, recognition in the Dean’s Report, and invitations to other School-wide events.

To learn more about becoming a member of the Ezekiel Hersey Council, please contact Mary Perry, Senior Director of Gift Planning, at 617-384-8449 or mary_perry@hms.harvard.edu
Alumni Fund Volunteer Leadership Index

**Alumni Fund Chair**  
Beth Y. Karlan MD ‘82  
Chair, Alumni Fund

**Past Alumni Fund Chairs**  
2011  
Daniel D. Federman, MD ‘53  
2008-2011  
Mark Hughes, MD ‘86  
2006–2008  
Daniel D. Federman, MD ‘53  
1997–2006  
Tenley Albright, MD ‘61  
1995–1996  
A. Clifford Barger, MD ‘43  
1992–1994  
Doris R. Bennett, MD ‘49  
1952–1961  
Thomas Lanman, MD ‘61  
1984–1992  
Joseph E. Murray, MD ‘43  
1972–1984  
Carl W. Walter, MD ‘32  
1971–1972  
Perry J. Culver, MD ‘41  
1961–1971  
Langdon Parsons, MD ‘21

**Class Agents**  
William Christensen, MD ‘42  
Joseph Murray, MD ‘43  
Adelbert Ames III, MD ‘45  
John Braasch, MD ‘46  
John Duggan, MD ‘47  
Philip Troen, MD ‘48  
Gerald Foster, MD ‘51  
Tor Richter, MD ‘51  
William Cochran, MD ‘52  
Philip Snodgrass, MD ‘53  
K. Frank Thomas, MD ‘54  
Thomas O’Brien, MD ‘54  
Roman DeSanctis, MD ‘55  
Mitchell Rabkin, MD ‘55  
Joel J. Alpert, MD ‘56  
Albert Crum, MD ‘57  
Howard Corwin, MD ‘58  
Paul Friedmann, MD ‘59  
Robert Blacklow, MD ‘59  
Joseph Barr Jr., MD ‘60  
Jane Schaller, MD ‘60  
Albert R. Frederick, MD ‘61  
Paul Davis, MD ‘63  
A.W. Karchmer, MD ‘64  
James Nelson, MD ‘65  
Eugene Appel, MD ‘66  
Laurence B. Gardner, MD ‘67  
Philip Goldsmith, MD ‘67  
David Oakes, MD ‘68  
George Thibault, MD ‘69  
Cary Akins, MD ‘70  
Michael Millis, MD ‘70  
Robert Beart Jr., MD ‘71  
Frederick Jones, MD ‘71  
Ann Bajart, MD ‘72  
Stephen Lipson, MD ‘72  
Barry R. Zitin, MD ‘73  
Anthony Russell, MD ‘74  
Homero Garza, MD ‘75  
Phyllis Gardner, MD ‘76  
David Nierenberg, MD ‘76  
Roger Steinert, MD ‘77  
Rhonda Rand, MD ‘79  
Charles F. Simmons, MD ‘80  
Perry Culver Jr., MD ‘81  
James J. O’Connell, MD ‘82  
Redmond Burke, MD ‘84  
Rosa Crum, MD ‘85  
Eliza Menninger, MD ‘87  
Christopher O’Donnell, MD ‘87  
Rosalie Tocco-Bradley, MD ‘88  
Glenn Chertow, MD ‘89  
Erica Schulman, MD ‘90  
William Hahn, MD ‘91  
Taine Pechet, MD ‘92  
Tamara Callahan, MD ‘93  
Michael Murphy, MD ‘93  
Marc Sabatine, MD ‘94  
Neal Baer, MD ‘95  
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Elissa Rottenberg, MD ‘99  
Jennifer Verbesey, MD ‘00  
Shelly-Ann Fluker, MD ‘01  
Elizabeth Austen Lawson, MD ‘02  
Elizabeth Buzney, MD ‘03  
Mary Beth Gordon, MD ‘03  
Oni Blackstock, MD ‘04  
Nancy Wei, ‘06  
Christopher J. Russell, MD ‘07  
Taniqua N. Alexander, MD ‘08  
Dr. Phillip N. Williams, MD ‘09  
Amara L. Mulder, MD ‘10  
Huma Farid, MD ‘11  
Mathew Baker, MD ‘11  
Hermi Lokko, MD ‘12  
Erika L McCarthy Walsh, MD ‘12