Thank You for the Privilege and Opportunity—A Grateful Alumnus

Dr. Joseph C. Cappelleri, MPH ’93, has infectious energy. He is a dynamic advocate for a higher purpose in his full-time work at Pfizer Inc., his teaching at Brown University and the University of Connecticut, and his volunteer work as an alumni interviewer for Harvard College. Speaking with him, one cannot escape feeling the “turbo power of psychology in living for a higher purpose,” as he describes it. “Every day is fresh. It’s as if I’ve never lived before, so I feel a new romance with the endeavor, whatever it is.”

As a statistical scientist and executive director of biostatistics at Pfizer, and as a Fellow of the American Statistical Association, he is a most prolific researcher in the pharmaceutical industry with more than 400 publications. He has co-authored at least 800 presentations in his 21 years at Pfizer and three years previously at Tufts University.
School of Medicine. “I’m not built this way,” he says. “I have to work at it humbly and continually. And that is the secret sauce. Working at it assiduously, meaningfully, and sincerely where substance and practice reign—and collaborating with others who have a shared interest.”

He credits his success in part to his experience with both the faculty and the students at the Harvard T.H. Chan School of Public Health.

“Harvard has been a beacon and champion in fostering faculty-student engagement. Mastery of subject matter is extended from professors to students, who benefit from this commendable ethos with elevated understanding and knowledge. Thus, the opportunity exists for a student to become a virtual chameleon in mastering coursework in public health and transcending it with original and influential research.”

One of his favorite experiences was case study at the School. “We were set up in Snyder Auditorium as if we were in an executive setting,” he says. “I envisioned the setting mimicking stellar institutions like the World Health Organization and its members having dynamic exchanges and discussion. We were expected to be prepared in knowing the case studies, because we might be called upon to discuss them—on the spur of the moment.” He loved it. “It resembled the Harvard Business School model.”

“The interaction with confident classmates from Alabama to Zimbabwe—including the center of the universe, Brooklyn, New York, where I was born and raised—brought out the better angels in all of us through infusing a culture of diversity, graciousness and industriousness. It created positive energy and raised standards, increasing expectations with a whirlpool of collaborative spirit.”

Dr. Cappelleri cites Professors Thomas Chalmers, Frederick Mosteller, Alexander Walker, and James Ware as particularly inspirational and wonderful. It was at Harvard Chan that he was first introduced to meta-analysis and evidence-based synthesis that have since become part of his research repertoire, including his present work. In collaboration with colleagues, both internal and external to Pfizer, he considers himself most fortunate to have been a major researcher for well-known medicines—Viagra, Lyrica, Chantix, Sutent—that have greatly benefited millions of patients worldwide.

Working on the development and validation of health measurement scales has also been a passion. Dr. Cappelleri is the lead author of the book Patient-Reported Outcomes: Measurement, Implementation and Interpretation. “My colleagues and I were the first
to develop and validate a self-report scale on erectile function—the International Index of Erectile Function—for regulatory acceptance,” he says. “In a separate undertaking, we provided strong evidence for the sound measurement properties of the Minnesota Nicotine Withdrawal Scale, which showed a benefit of Chantix in terms of reducing the urge to smoke, and received a regulatory label claim.”

Dr. Cappelleri expanded his knowledge of health measurement scales at Harvard. He also completed a postdoctoral internship in meta-analysis in addition to immersing himself in coursework on epidemiology, a subject that he has taught at the University of Connecticut and whose principles he uses regularly at Pfizer.

He credits his positive experiences at Harvard and at the Harvard Chan School with his decision to ultimately create a seven-figure endowed bequest for research, to be divided equally between the Center for Population and Development Studies and the Lee Kum Sheung Center for Health and Happiness.

“Giving to Harvard is important because private resources empower the University to advance its mission, fulfilling its ideals for education, research, and enterprise,” he says. “I have experienced the trials and tribulations of life that have forced me to go down deep to the bowels of my existence and examine what life is about. Life is certainly a lot more than my infinitesimal speck in this universe. So I want to give back with dividends, with gratitude, with appreciation for what Harvard has given me in terms of knowledge, opportunities, and connections—and for providing a conduit to realize my potential.”

Dr. Cappelleri’s own mission is to bring out the best in the human condition, for himself and for others. “I want to say thanks for the opportunity and the privilege to be a proud citizen within the first-class Harvard community and its fabulous Harvard T.H. Chan School of Public Health,” he says. “Now it’s my turn to give to you. Doing so gives me complete closure and satisfaction in my life’s journey that has centered on education and research.”

If and Then: Planning Your Gift

Mathematicians and computer programmers use conditional statements—“If a, then b”—as crucial building blocks for countless theorems and algorithms. Some are quite simple, while others can be exceedingly complex.

Of course, we encounter “if-then” logic on a regular basis outside the math realm. We don’t have to be experts in physics or gravity to know that if we need medical attention, then we should consult a physician (rather than simply relying on information found on the internet).

If-then principles can also apply to gift planning. For example, if you own an IRA and are 70½ years old or older, then you may be able to use your IRA assets to make a meaningful gift in a tax-favored way.

You can direct your IRA custodian to make a qualified charitable distribution (up to $100,000) from your IRA directly to the Harvard Chan School. This distribution counts toward your required minimum distribution and no tax is due! It’s a simple, tax-wise way to meet charitable goals and make an immediate impact at the Harvard T.H. Chan School of Public Health. You are allowed to make these gifts every year.

You also can create an endowed financial aid fund with $100,000 from your IRA.

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Many programs at the Chan School, such as “Voices in Leadership,” can be supported with a gift from an IRA rollover.
Another excellent way to use retirement assets is to name the Harvard Chan School as the beneficiary of your qualified retirement plan. There are two distinct benefits to this type of gift. First, you retain lifetime control of your retirement funds. Second, if you leave these tax-deferred assets to heirs, they must pay income tax on funds they receive. A better strategy can be leaving more tax-friendly assets to heirs while giving the retirement assets to the Harvard Chan School. Ask us for details.

A tax deduction makes a real difference
Generally speaking, the higher your income, the greater your tax bill. As your income increases, the percentage of tax that you are expected to pay on your income also increases. As an individual reaches specific taxable income thresholds, the rate increases up to a maximum of 39.6% for individual taxpayers with taxable income over $418,400.

Appreciated stock
A gift of appreciated stock can make an important tax impact. For stock held more than one year, the full amount of the gift is deductible, and no capital gains tax is due on the stock’s appreciated value.

Example: If Mary Ann purchased stock for $5,000 four years ago and it is now worth $20,000, she can deduct the full $20,000 value if she gives the stock to the School and itemizes her tax deductions. In addition, she pays no tax on the $15,000 appreciation. It’s a double tax benefit—a tax deduction and no capital gains tax is due.

There is another reason for considering a gift of appreciated stock—particularly if you are considering selling stock. The net investment income tax is a 3.8% surtax that applies when an individual reaches specific income threshold amounts ($200,000 for singles and $250,000 for couples). Capital gains tax from the sale of appreciated stock can trigger this surtax. By making a gift of the stock, you can avoid the net investment income tax.

When your glass is completely full
Qualified retirement plans have strict annual contribution limitations. If you reach your contribution limit, then you may want to create a charitable gift annuity—a way to make a gift that qualifies for a tax deduction and provides income for retirement.

Example: Eileen, age 60, contributes the maximum amount to her qualified plan every year. She would like to support the School’s work, but she is keenly interested in ensuring that she will be able to meet her future retirement needs. One option that accomplishes both goals is a deferred gift annuity. Eileen can make a $25,000 gift today and defer payments for 10 years (when she plans to retire). The gift qualifies for a tax deduction of $6,101.* Eileen will begin receiving annual payments at age 70 of $2,425—and those payments will continue for life.

Gift annuities can have one or two income beneficiaries. Furthermore, you can establish multiple gift annuities, and they will not affect qualified retirement plan arrangements in any way.

A gift in your will or trust
A simple and effective way to make a personally meaningful gift is to include the Harvard Chan School in a will or living trust. In addition to supporting the School’s work, you set an example that encourages others and expresses the values that are important to you.
1913 Society Roster

The year 1913 was an auspicious one. The U.S. Post Office began parcel post deliveries. Picasso had his first U.S. show at the New York Armory. Igor Stravinsky’s “Rite of Spring” created a riot in Paris. And in September of that year, the new Harvard-MIT School for Health Officers welcomed its first class of eight. From humble beginnings, the Harvard T.H. Chan School of Public Health is now the world’s leading authority on global health issues. We are proud that our legacy society donors have deemed the Harvard Chan School worthy of a bequest or other kind of planned gift, and we list the names of 1913 Society members here. Thank you for making the future of the Harvard Chan School a part of your legacy.

Anonymous (14)
Don Abramowitz, SM ’82
Joanne H. Allport, MPH ’87
Nelson K. Aweh III
Yalcin Ayasli, SD ’73
Joan R. Baer and Arthur Bugs Baer
Amy C.arkin, MPH ’76
Dr. Susanna E. Bedell
Judith Benfari and
Robert C. Benfari, SM ’67
Terry M. Bennett, MD ’64, MPH ’69
Eugene P. Berg, Jr.
Rita D. Berksen, SM ’77, and
Randolph B. Reinhold
Mrs. William McCormick Blair, Jr.
Barry R. Bloom
Stanley P. Bohrer, MD ’58, MPH ’75
Gary P. Bond, AB ’73, SM ’76
Dr. Joe Brain
Annette B. Burke and
Joseph A. Burke, SM ’72
Deanna L. Byck, SD ’98
Dr. Joseph C. Cappelleri, MPH ’93
Mr. Eric Clow and Dr. Fong Wang Clow,
SM ’86, SD ’89
Prudence Slitor Crozier, PhD ’71, and
William M. Crozier, Jr., MBA ’63
Joan P. Curhan
Joan Selig Damson and
Barrie M. Damson
Jean M. Doherty-Greenberg, MPH ’79, and
David A. Greenberg, MPH ’80
Lena E. Dohlman-Gerhart, MD
Mary K. Donaldson
Mike and Evelyn Donatelli
Patricia A. Donovan and
William B. Donovan, SM ’70
G. Rita Dudley-Grant, MPH ’84
Nancy Elliott and Paul T. Johnston
Susan A. Elliott and Pat Nicolette
Sarah and Stephen Eraker
Sumner L. Feldberg
James D. Felsen, MPH ’72
Virginia O. Fine
Dr. Harvey V. Fineberg and
Dr. Mary E. Wilson
Michael and Kier First
Katherine A. Forrest, MPH ’71
Niki Friedberg and A. Alan Friedberg
Dr. Barbara A. Gales, MD, MPH ’91
Edward Crocker Green, PDS ’02
Lt. Cmd. Julie George, MPH ’94
Douglas I. Hammer, MPH ’68, DPH ’76
Peter O. Haughey, SM ’98
Francis Helmsinki, MPH ’85
Dr. Charles H. Hennekens, MPH ’72,
DPH ’75, SM ’75
Maria Helena Henriques-Mueller, SD ’84
James F. Henry
Jose R. Hernandez-Montoya, MPH ’80
Oliver W. Holmes
Lilli Schwenk Hornig
Robin C. Herman and Paul F. Horvitz
Howard Hu, MPH ’82, SM ’86, SD ’90
Dr. Ping Hu, SM ’93, SD ’96, and
Mr. Jie Zhao
Professor George Hutchison, MPH ’60
Joan L. Jacobson and
Julius H. Jacobson II
Nancy Johnson and Timothy Johnson, MD,
MPH ’76
Marion A. Jordan, SM ’77
Apa Juntavee, MPH ’95
Dr. Chander Mukhi Kapoor Kapasi,
MPH ’75, and Dr. Ona Kapasi
Stephen B. Kay, AB ’56, MBA ’58
Maurice E. Keenan, M.D. ’77
Leonard J. Kirschner, MD, MPH ’68,
and Peggy D. Gilbert
Geoffrey Kronik
Karim F. Lalji, SM ’91
Stanley N. Lapidus
Mary Ann Lavin, SM ’74, SD ’78
Paul S. Lee, Jr.
Ann M. Lewicki, MPH ’76
Chunhua Liu, SM ’98, SD ’00
Shih-Ho Lue, MPH ’08
Nancy J. Marr, SM ’89
Keitaro Matsuo, SM ’03
Shaw McDermott
Steven Uranga McKane, MPH ’79
Marjorie J. Mclemore
Jeffrey W. Mecaskey, SM ’90
L. Santiago Medina, MD, MPH ’97, and
Olga L. Villegas-Medina, MD, MPH
Nyla Medlock
Roger J. Meyer, MPH ’59
Joseph M. Miller, AB ’42, MD ’45, MPH ’60
Dr. Katharine E. Morley, MPH ’10, and
Michael G. Morley, SM ’11
Lois H. Moser and
Royce Moser, Jr., MPH ’65
Marva Nathan, SM ’83
Diedre O’Connor
Chong Moo Park, MPH ’54
Robert O. Preyer and Mary Preyer George
Putnam
Joyce A. Quelch and
Professor John A. Quelch, SM ’78
Kakaraparti V. Rao, SM ’72
Helen Z. Reinherz, SM ’62, SD ’65
Christopher James Ronk, SM ’08, SD ’10
Donald J. Rosato, MD, MPH ’63
Phyllis Rose
Louise G. Schloerb and Paul R. Schloerb
Marjorie W. Sharmat
Bernard Sheilen, SM ’63
Eleanor G. Shore, MPH ’70, and
Miles F. Shore
Joan Smilow and Joel E. Smilow
Sanvi Sengireddy
Dr. Hope Snider, MPH ’64
Ruth F. Snider and Eliot L. Snider
Isabelle Valadian, MPH ’53
Hasi Majumdar Venkatatchalam, MPH ’68
Michael W. Voligny
Marilyn R. Walter and
Michael W. Voligny
Royce Moser, Jr., MPH ’65
Marva Nathan, SM ’83
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Michael W. Voligny
Marilyn R. Walter and
Ronald A. Walter, SM ’72
Thomas G. White, SM ’52
Douglas I. Hammer, MPH ’68, DPH ’76
Lt. Cmd. Julie George, MPH ’94
James F. Henry

Membership in the 1913 Society is open to anyone who creates a bequest for the Harvard T.H. Chan School of Public Health or gives a life-income or other type of planned gift. If you think you should (or should not) be listed here, please let us know by e-mail at jtcantor@hsph.harvard.edu or phone us at 617-432-8071. When you join the 1913 Society, in addition to this lapel pin and a special Welcome Packet, you will receive invitations to exclusive events for 1913 Society members and news on a quarterly basis.
1913 Society Luncheon

Monday, May 22, 2017, marked the third annual luncheon of the 1913 Society at the Charles Hotel. There was a record response with more than 100 attendees. A provocative panel discussion, U. S. Health Care: 2017 and Beyond, was led by Barry R. Bloom, Distinguished Service Professor and Joan L. and Julius H. Jacobson Professor of Public Health in the Department of Immunology and Infectious Diseases and Department of Global Health and Population. Dr. Timothy Johnson, MPH ’76, one of the nation’s leading medical communicators of health care information and former chief medical editor for ABC News for 25 years, moderated the session.

John E. McDonough, professor of public health practice in the Department of Health Policy and Management at Harvard T.H. Chan School of Public Health and a member of the Massachusetts House of Representatives from 1985 to 1997, and Robert J. Blendon, the Richard L. Menschel Professor and senior associate dean for policy translation and leadership development at the Harvard Chan School, rounded out the panel. A transcript of the panel discussion is available by contacting Tina C. Lin at tcl@hsph.harvard.edu.

Next year’s 1913 Society luncheon will be held on May 21 or 22. A “Save the Date” notice will be sent to you soon. We hope you can join us.
Dr. Tim Johnson, MPH ’76, greets Dr. Samuel O. Thier. Professor Barry Bloom speaks with Dr. Youko Yeracaris; Professor John E. McDonough, MPA ’90, with Dr. Miles F. Shore, AB ’50, MD ’54; and Professor Robert J. Blendon, with Stephen B. Kay, AB ’56, MBA ’58.

Adrienne N. Rabkin

Robert O. Preyer and Ronald C. Curhan, MBA ’57, DBA ’71
There are a variety of options to choose from when deciding how to make a gift in your will or trust. You can allocate:

- A percentage of your estate
- A specific amount
- Your residual estate—what is left after all other obligations have been met (costs, debts, taxes, and other specific designations)

**Language for a Gift in Your Will, IRA Bequest, or Trust**

A bequest to support the work of the Harvard Chan School should be directed to: The President and Fellows of Harvard College for the Harvard T.H. Chan School of Public Health, Tax ID#04-2103580, 124 Mt. Auburn Street, Cambridge, MA 02138. Thank you.

You can also direct assets into a gift trust. The trust can pay an annual income to your named beneficiaries for a number of years, with the remainder of the trust assets distributed to the Harvard Chan School when the trust expires.

**Property possibilities**

If you own a second home or other property that you no longer wish to own or manage, a gift of real estate may be a sound financial decision.

Selling highly appreciated property can result in a substantial tax bill, with the gain taxed at 15% or 20%. But like gifts of appreciated stock, the gift of a home or other real estate lets you enjoy an income-tax deduction for the full value of the property, while avoiding the capital gains tax on the appreciation!

Example: Nathan owns a vacation home worth $300,000. He purchased it over 20 years ago for $100,000. Selling the home will result in a substantial capital gains tax on the $200,000 appreciation. Instead, Nathan makes a gift of the property. He qualifies for a tax deduction equal to the full value of the property—$300,000—and no capital gains tax is due.

**Contact us**

We encourage you to send us an email (jtcantor@hsph.harvard.edu) or give us a call (617-432-8071) to find out more about the gift options that are available to you. Thank you again for your thoughtfulness and generosity—we look forward to hearing from you.