I have been a Trustee of The Jackson Laboratory (JAX) for over a decade, and it’s important to me to champion the organization in every way I can. That’s why I decided to add planned gifts to the ways in which I support the Laboratory. I had already been making annual gifts to JAX as well as some larger restricted gifts, and I found that planned gifts were a perfect opportunity to further amplify my support for JAX’s innovative research.

In my case, I transferred a paid-up whole life insurance policy to JAX. Since our children are now adults, my husband, Randy, and I now have less need for life insurance, and transferring ownership of the policy — which JAX was then able to cash out — resulted in an immediate benefit to the Laboratory, providing additional funding to fuel scientific discovery. I’ve also named JAX as a beneficiary of an IRA, ensuring that my support for the Laboratory’s mission will be part of my legacy in the future.

These are just two of the many planned giving options available, and I’d encourage people interested in maximizing the impact of their philanthropy to contact the JAX planned giving staff to find the option that’s right for them.

—Kathleen Corbet
Fifty years ago, I was selected for one of the coveted positions in the College Student Summer Program. There were 450 applicants at that time. It was my lifetime dream to be a tiny part of the cancer and genetics research at The Jackson Laboratory. During the summer of 1968, I used a technique of skin grafting on tails of inbred strains of mice to answer one small question in transplantation genetics.

I have worked in the medical field for almost 50 years. As a medical technologist with a specialty in blood banking and then as a physician assistant, I have often used knowledge I obtained from that summer. It has been fascinating to observe the advances in transplantation, human genetics and understanding diseases over the years.

One big lesson from my sponsoring scientist that summer was to commit to give back through teaching, mentoring, encouraging and supporting those who will follow in medical research. Support includes financial contributions that enable promising young scientists to experience a summer of research at JAX. I decided an appropriate way to celebrate my 50-year anniversary of my summer doing research was to sponsor two students.

I would like to recognize my sponsor-scientist, the late Dr. Donald W. Bailey, and Dr. Larry Mobraaten, who was his research assistant. Other distinguished scientists from the summer of 1968 were Dr. Clarence C. Little, Dr. George Snell and Dr. Victor McKusick. These five scientists were significant to me throughout my career. Their legacy lives on through continuing research and the young scientists who will encounter their valuable contributions.

—Jean R. Bybee ’68
My introduction to The Jackson Laboratory came through a Verrill Dana luncheon. What an exciting and enthusiastic group of researchers! I found stimulating scientists who would speak with such enthusiasm about their specialties. Their talks were very enlightening and understandable. Through their depth of knowledge and clarity, these scientists were able to effectively define the mission of The Jackson Laboratory.

JAX is the foundation of many successes in medicine here and around the world. Cancer, diabetes and Alzheimer’s are all diseases that The Jackson Laboratory is looking toward eradicating. I simply cannot think of an organization more deserving of my support now and after my death.

— Janet D. Brand

Janet Brand passed away in late 2017. Her legacy lives on through research funded by her generous estate gift to JAX.

Making an impact on the future

“I simply cannot think of an organization more deserving of my support.”

— Janet D. Brand

Create a plan for the future

There are many ways you can ensure your support for JAX and the lifesaving work we do continues for years to come. To get started planning a future that supports your loved ones, and the causes and organizations that matter most to you, fill out and return the enclosed reply card to request your copy of the free guide *Estate planning starters.*
Determine your estate size in 4 steps

It’s important to know the scope and value of your estate. After all, you can’t decide what to leave to others if you aren’t sure what you own. Here are four steps you can take to determine the size of your estate.

**Step 1: List your major assets**
Assets can include many things, such as:
- Your home, land and other real property
- Stocks and bonds
- Cash, including savings accounts and CDs
- Tangible personal property (including autos, jewelry and antiques)
- Assets in which you have an income interest (such as an annuity)
- Retirement accounts such as 401(k)s or IRAs
- Life insurance
- Equity/ownership interest in a business like a sole proprietorship or partnership

**Step 2: Assign a value**
Use the current market value for your major assets. Don’t strive for exact amounts. Rounded numbers are fine.

**Step 3: Determine how and with whom your assets are owned**
Ownership generally falls into three categories: solely owned, jointly owned with rights of survivorship and tenancy in common. Owning an asset with your brother is different than owning an asset with your spouse. Also, married couples who live in community property states have additional record-keeping requirements.

**Step 4: Calculate your debts**
What you owe is subtracted from the value of the assets when you pass. The most common debt is a mortgage on a primary residence or vacation house. Credit card balances and other loans are also calculated here.

These steps will set you well on your way to developing an estate plan.

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