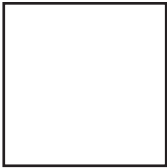




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Mechanicsburg, PA 17050-1885



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# Physician Legacy Newsletter



INSIDE THIS ISSUE: A LEGACY OF COMPASSION | COUNTDOWN IS ON | MAKE A DIFFERENCE



Contact us at 717-558-7813 to get started.  
[plannedgiving.foundationpamedsoc.org](https://plannedgiving.foundationpamedsoc.org)

# Physician Legacy Newsletter

GIFT PLANNING NEWSLETTER



FALL 2024



## A Legacy of Compassion

Honoring someone is no easy feat, especially when that someone is your father. For Alfred Wayne Troncelliti, MD, it was not just about honoring his father, but also about making a lasting impact.

Dr. Troncelliti shared, “My wife and I’s decision to establish a legacy scholarship with The Foundation stems from a deep desire to honor my father and to leave a lasting impact on the field of medicine.”

Born in a small rural town in southern Italy as the youngest of ten children, his father’s hard work and dedication to his patients inspired young Dr. A. Wayne Troncelliti to pursue a career in medicine. “My father Alfred E. Troncelliti, MD, was a true icon of hard work, dedication, and unwavering care for his patients.”

After completing his residency, Dr. A. Wayne Troncelliti joined his father’s practice, working side by side for 14 years. He fondly remembers finally being able to give his dad the weekend and evening breaks he deserved. “Throughout his sixty years of active medical practice, he was not only a great teacher but also a compassionate physician who believed

in going above and beyond to attend to the needs of his patients.”

Choosing The Foundation as the recipient of their planned estate gift was an easy decision for Dr. Troncelliti, given its commitment to quality care and the value of perpetuating good medical practices. “Throughout my career, PAMED has supported and protected me, and I trust The Foundation to uphold this legacy,” he said.



“Our gift to The Foundation is a tribute to my father’s legacy and our shared passion for medicine. The Foundation’s commitment to helping the next generation of physicians aligns perfectly with our values. We believe that compassionate physicians providing good care is one of the most valuable contributions to society.”

By establishing this legacy scholarship through their will, the Troncelliti family’s gift will significantly impact The Foundation’s mission by supporting the next generation of medical students. Dr. Troncelliti emphasized, “We really want to ensure that the values, dedication, and excellence in medicine are passed on to future generations for the continued provision of quality health care.”



# Countdown Is On: Tax-Savvy Year-End Giving Tips

This is the time of year when many of us think about charitable giving as a part of our busy holiday to-do list. Your year-end charitable contributions bring tax benefits, so now is a good time to refresh your memory on some of the tax-smart options available to you.

**Giving Appreciated Securities** – You may be able to double your tax benefits by contributing stocks, bonds, or mutual funds that are now worth more than you paid for them a year or more ago, even if they have lost some value recently. You will receive an income tax charitable deduction for the share price at the time of your gift, and you avoid the capital gains tax that you would have owed if you sold them.

**IRA “Charitable Rollover”** – If you are age 70½ or older, an IRA Charitable Rollover, otherwise known as a Qualified Charitable Distribution or QCD, allows you to contribute up to \$105,000 in 2024 from your IRA directly to charitable organizations with no tax on the withdrawal. If you are subject to a Required Minimum Distribution (RMD), your QCD contribution can help meet your RMD without increasing your taxable income.

**Donor-Advised Fund (DAF) Distribution** – Donor-advised funds are the fastest-growing charitable giving vehicle in the United States. With a DAF you may contribute a large sum to establish the fund and then over time you can recommend grants from your DAF to the organizations you wish to support, like The Foundation of the Pennsylvania Medical Society. DAF contributions are popular at year-end since it makes your giving easy.

As always, your own advisors are in the best position to help you decide what would be most appropriate for you. We are available to work with you and your advisors as you consider gift options. Remember that some gifts can take longer to accomplish, so please be aware of timing if you are interested in meeting a year-end deadline.

# Make a Difference With a Few Words

There is a common misconception that only the rich need to make a will. That is not true. A will eases the pain of your passing on those you leave behind, and without a will, regardless of your personal wishes, state laws will determine the transfer of your estate.

There is an even bigger misconception that only the super-rich leave money to charity when they die. That’s also not true. The fact is that most gifts by will, (bequests), are made by everyday people who want to have a lasting, positive impact on their community.

Here are four reasons why you should include The Foundation of the Pennsylvania Medical Society in your will:

## A Gift by Will Is Easy to Make

A bequest is one of the easiest charitable gifts to make. It is simple to implement, and easy to change should you ever need to. You can give specific property or designate a dollar amount or a percentage of your estate. You can also designate The Foundation of the Pennsylvania Medical Society as a beneficiary of your retirement plan or life insurance policy.

## A Gift by Will Does Not Alter Your Current Lifestyle

Making a bequest is a way of demonstrating your commitment to the future of The Foundation of the Pennsylvania Medical Society that does not affect your current asset balance or cash flow. There are no substantial costs, and the gift can easily be modified to address your changing needs.

## A Gift by Will Can Change Lives

The Foundation of the Pennsylvania Medical Society places a high value on the well-being of Pennsylvanians and sustained the future of medicine in the commonwealth through our programs and services. A bequest can help The Foundation of the Pennsylvania Medical Society further its mission and continue making a difference for generations to come.

## A Will Creates A Lasting Legacy

Including The Foundation of the Pennsylvania Medical Society in your will is a great way to bring dignity, meaning, and purpose to a life well lived. You can demonstrate your commitment to the future of The Foundation of the Pennsylvania Medical Society, and better yet, a bequest can allow you to increase your support to a level you may have always wanted to but were unable to during your lifetime.

You don’t have to be wealthy to make a difference. Whoever you are, whatever your situation, you can help make a better world by including a charity in your will.

**Our legal name:**  
**The Foundation of the Pennsylvania Medical Society**

**Our federal tax ID:**  
**37-1732501**

**The Foundation of the Pennsylvania Medical Society provides programs and services for individual physicians and others that improve the well-being of Pennsylvanians and sustain the future of medicine.**



Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Home Phone \_\_\_\_\_

Other Phone \_\_\_\_\_

Email Address \_\_\_\_\_

For confidentiality: tear, fold, tape and return.

- I am pleased to inform you that:
- ☐ I have included The Foundation in my estate plans.
  - ☐ I am considering including The Foundation in my estate plans.

- Please send me information on the following:
- ☐ Appreciated Securities
  - ☐ IRA Charitable Rollover/QCD
  - ☐ Donor-Advised Fund
  - ☐ A Gift by Will or Trust

If you have any questions, contact:

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Visit our planned giving website at [plannedgiving.foundationpamedsoc.org](https://plannedgiving.foundationpamedsoc.org).