

UPSTATE Today & Tomorrow



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FALL 2024

Tending to therapy: Mary Pat and Joe Hartnett establish fund to revitalize Upstate Cancer Center's healing garden

Mary Pat and Joe Hartnett are making a lasting impact through their generous support of the Upstate Cancer Center's healing garden. By establishing the Hartnett Family Fund at the Upstate Foundation, they are providing support for both the renovation and ongoing maintenance of the garden, ensuring it remains a place of beauty and solace for years to come. Their commitment includes a legacy gift to the Upstate Foundation to enable future enhancements beyond routine upkeep.



"We all have something to share, not always money, but we all can share."

Mary Pat, a retired nurse with 27 years at Upstate University Hospital, had a deep connection to the cancer patients who used the garden. "I always saw potential for the garden to be more than it was," she recalled. After discussing estate plans with their attorney, the Hartnetts decided to act immediately on their wish to improve the garden. Mary Pat made the call to the Upstate Foundation the very next day.

Mary Pat spoke with Carolyn Hendrickson, director of planned giving, who immediately sprang into action alongside SWBR, the landscape architects selected to redesign the space. The updated garden features carefully selected plants to ensure year-round beauty, with special consideration given to visibility from various areas of the Cancer Center.

Carolyn viewed the collaboration with the Hartnetts as particularly rewarding, noting the satisfaction in helping them establish a sustainable legacy for the garden, while fulfilling their dream of creating something meaningful for the community.



Mary Pat and Joe Hartnett in the renovated healing garden outside the Upstate Cancer Center

Mary Pat and Joe's generosity is more than a financial contribution; it's a testament to their values and a way to inspire future generations. They have taken much enjoyment in bringing this project to life, and typically would not share this publicly, but wanted to encourage others to take action in any way they could. "We all have something to share, not always money, but we all can share," Joe said.

To contribute to the Hartnett Family Fund visit www.UpstateFoundation.org/donate. **Fund #18300**

Upstate Today & Tomorrow highlights timely ideas and stories showing the profound impact of a planned gift to the Upstate Foundation.



For more information or to have a confidential conversation regarding your legacy gift plans, contact Carolyn Hendrickson at 315-464-6490 or HendricC@upstate.edu.

www.UpstateFoundation.org
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Honoring the past: Professor Robert L. Sunheimer leaves a lasting legacy to empower future leaders in clinical laboratory sciences



The Upstate Foundation's Carolyn Hendrickson presents an Upstate Legacy Society gift to Robert Sunheimer.

Professor Emeritus Robert L. Sunheimer '74, MSMT(ASCP), dedicated nearly 50 years to Clinical Laboratory Sciences at the College of Health Professions at Upstate Medical University. He recently established the Robert L. Sunheimer Clinical Laboratory Sciences Endowment at the Upstate Foundation to

inspire and support current students, and has designated the Foundation as a beneficiary in his will to ensure future generations of laboratory professionals continue to advance health care.

"I remember receiving a scholarship when I went to college and how meaningful it was for me," Bob said. "Witnessing

the rising cost of education, I want to assist students and inspire others to do the same."

Bob's journey began with a dream of becoming a chemist, but financial constraints led him to military service. After his discharge, the GI Bill allowed him to pursue his education and discover his passion for Medical Technology (the former name of the Clinical Laboratory Sciences program). His academic path led him to Upstate Medical University, where he earned a Master of Science in Medical Technology.

Throughout his career, Bob alternated between clinical work and teaching, ultimately committing to shaping future lab scientists. His impact extended beyond the classroom to significant contributions in laboratory instrumentation and a prolific writing career, including co-authoring chapters in key clinical diagnosis textbooks.

To contribute to the Robert L. Sunheimer Clinical Laboratory Sciences Endowment, visit UpstateFoundation.org/chpalumni/donate. **Fund #73657**

Identify your "social" capital in order to understand the potential you have for legacy planning

One thing our firm has learned over 30 years is that many folks have trouble conceiving of how they might do charitable planning because they haven't identified what part of their estate may be "family" capital and what part might be able to be considered "social" capital. The exercise to identify these capital sums can be simple or complex. While it can be done without assistance, utilizing a financial advisor and developing an actual financial plan focusing on estate and philanthropic planning can increase the peace of mind achieved and the conviction one can have in the validity of the calculations. Once family capital is identified, the process of allocating family wealth to benefit the causes and communities one cares about can begin in earnest.

Understandably, allocating capital to charitable donations is an emotionally charged process. Retirees rarely have trouble recalling the toil and sacrifices that were made through a lifetime of work and thrift to end up with wealth that exceeds what would be needed

for a comfortable retirement. Coming to see any of that wealth as "excess" is arguably somewhat antithetical to the mindset and habits that were required to accumulate it.

As advisors, we tend to get ourselves and our clients a bit bogged down in the techniques for giving and complex efforts to find the perfect leverage. However, it's often most important to do the simple work first: identify the "social" capital and proceed forward with confidence.

Dean J. Ripley
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FUNDS IN THE SPOTLIGHT

The Upstate Foundation manages over 1,200 funds, the most of any charitable organization in the region, in support of patient care, education of health care providers, scientific research, and community health and well-being. Below are just a few of the Foundation's many funds.

Evan D. Gould Memorial Fund #19501 – The specific purpose of this fund is to support research, treatment, education and awareness for people, especially young adults, struggling with mental illness and chemical dependencies.

Support for Families of Suicidal Individuals Fund #44605 – The specific purpose of this fund is to provide case management services to the families of individuals at high risk for suicide.

Barbara Gonnella Memorial Scholarship for CLS #64000 – To provide a scholarship to a second-year Medical Technology student in the Clinical Laboratory Sciences department of the College of Health Professions.

Upstate Cancer Center Patient Assistance Fund #47669 – The specific purpose of this fund is to provide direct support to adult cancer patients and their families covering a wide variety of needs to help ease the financial and emotional burden along their cancer journey.

To find the fund – or create a new one – that matches your giving interests, contact the Foundation or visit www.UpstateFoundation.org/fundsearch