Tony Taddeo and cardiac surgeon Michael Mack are not a typical pair of running buddies. One is a 91 year old with a new aortic heart valve, and the other is the doctor who arranged the surgery and treatment that got the jogger back on the track.

“For me, running is a panacea,” said Tony, a retired teacher and psychologist who lives in McKinney, Texas. “It’s such a feeling of wellness, it became an addiction. And it’s part of my identity.”

So when he turned 70 and doctors told him perhaps it was time just to walk, he smiled and ignored them. He kept running: a couple of miles about five times a week and an occasional 5K. One night Tony felt a crushing pain, “like a piece of concrete on my chest.” Typical for him, he ignored it, but a week later finally went to the doctor, complaining of pain and dizziness.

Tests revealed severe aortic stenosis, a narrowing of the vital heart valve, which obstructs blood flow from the heart.

The solution is generally a replacement valve, implanted with open-heart surgery. That can be debilitating and dangerous for elderly patients, with an extended recovery period, if they can withstand the procedure at all.

At The Heart Hospital Baylor Plano, Dr. Mack, chairman of the hospital’s research center and medical director, Cardiovascular Surgery, had a better idea.

It’s called TAVR, which stands for transcatheter aortic valve replacement. Surgeons insert a catheter, with the new valve attached, into an artery through the leg or groin and guide it to the correct position, eliminating the need to break the breastbone and place the patient on a heart-lung bypass machine.

“Untreated, the outcomes (for aortic stenosis patients) are worse than most cancers,” Dr. Mack said.

When Dr. Mack assessed Tony at The Heart Hospital Baylor Plano, they discovered they shared a passion for running — “and I challenged him to a 5K race after the surgery,” Tony said.

“It’s obvious a patient’s attitude counts for a lot,” said Dr. Mack, who ran a marathon on his 40th birthday but has kept his distances shorter since then. “He was an ideal candidate.”

The new valve was inserted through an artery in his leg on Jan. 29. Tony went home the next day.

“It’s like gaining 20 years,” he said.

A month after the surgery, he ran a 5K “and I wasn’t even panting or breathing hard. This is a wonderful gift. Now my goal is to run a 5K when I’m 100.”

He and Dr. Mack met recently at the hospital to say hello, catch up and renew the challenge.

“I’ve done three or four 5Ks and I run two miles a few times a week,” Tony teased. “How about you?”

“I was waiting for you,” the cardiac surgeon replied with a smile. “Once it cools down, we’ll set a date.”
Cliff Lura, Director of Charitable Estate Planning, has been around long enough to remember when American Heart Association chapters had individual tax ID numbers.

Celebrating 50 years as an American Heart Association employee in September, it’s just one of many things different about the organization today.

It was in 1966 in one of those chapters in California that a $100,000 bequest got Cliff’s attention.

“It was my first year with the association,” said Cliff, then the assistant to the director of the Central Mission Trails Chapter. “Our entire fundraising goal was $100,000.”

“Two years later, I was the Executive Director of Riverside County when we received a $14 million trust from a woman who had passed away in Palm Springs.”

These large gifts inspired Cliff to absorb charitable estate planning — leaving a gift through your will or trust — into his role as the Chapter Executive Director. Back then, his chapter was one of only a few in the association proactively seeking planned gifts.

“You don’t ask for a gift; you listen for the gift,” Cliff said. “You help the individual do what they want to do, and what is best for them.”

Cliff knows that charitable estate planning is mutually beneficial to the organization and the donor. That’s why he set up his own testamentary charitable trust and charitable gift annuity.

“When I die, the charitable trust will pay my wife for as long as she lives, then it will pay my kids for another 10 years beyond that, and then it goes to the association,” he said. “My wife won’t have to worry, because she’ll have a steady income. It’s a good planning tool for families.”

Cliff shares this kind of useful information at estate planning seminars, one of his favorite activities.

“There was one seminar where a woman asked me about gift annuities,” he said. “She had lost her husband only three months prior. She set one up for $100,000, and then included the association in her trust. Every year she gets an income from her deceased husband’s IRA, and she gives $100,000 to different charities, one of which is the association. She came to us through an estate planning seminar.”

Cliff calls charitable estate planning “the ultimate” when it comes to career paths. For him, the ultimate gift was his favorite uncle receiving CPR, which saved his life.

“When I first started at the association, it was required that staff serve on several different committees and one of mine was CPR,” he said. “We were teaching doctors, nurses and ambulance medics how to perform CPR. Today, we have CPR Anytime Kits. Research brought us that. CPR is a lifesaver.”

After CPR saved his uncle’s life, it’s no surprise that Cliff’s “Why” is his family. Cliff is married and has 10 children and stepchildren, including his youngest who passed away last year. He also has 17 grandchildren and four great grandchildren.

And his reason for staying with the American Heart Association for 50 years is no surprise either: “I’m just giving back.”
OUR RESEARCH VISION

THE URGENCY FOR DISCOVERY IS GREAT
Heart disease is the No. 1 killer in the world. Stroke is No. 2. We lose 17 million lives each year and there is no cure.

THE AHA FUNDS THE MOST MERITORIOUS SCIENCE ANYWHERE

to give us the greatest chance of saving lives EVERYWHERE.

THE AHA HAS INVESTED $4 BILLION in research since 1949, second only to the federal government.

THE AHA INVESTS in the careers of the best and brightest young investigators and established researchers and works to ensure diversity of perspective across our research.

AHA-FUNDED RESEARCH
has resulted in discoveries that have saved lives in every community in the United States.

THE NEW KNOWLEDGE THAT RESULTS FROM AHA-FUNDED RESEARCH benefits millions of lives in every community and in every nation, and is translated into guidelines to provide the best, most updated care.

TO ENSURE OUR CONTINUED IMPACT
the AHA is boldly moving into innovative, transformational areas such as precision medicine, multidisciplinary research teams, big data and accelerating emerging technologies.

FUNDING RESEARCH is a cornerstone of the American Heart Association's lifesaving mission. It always has been and always will be.

THE AHA RESEARCH FUNDING PROCESS maximizes the impact of donor dollars by funding the most meritorious research across the country.

In 2015-16, a total of 766 MERITORIOUS RESEARCH GRANTS WORTH $116 MILLION WENT UNFUNDED. The need for more research funding is critical.
Q: What are the benefits of giving a charitable gift through my IRA?

A: Using a traditional IRA to make charitable gifts can be extremely tax-advantageous.

The on-again, off-again IRA rollover gift provisions in the tax code were finally made permanent in 2015. This allows an individual, aged 70 1/2 or older, to contribute up to $100,000 annually from their IRA as charitable contributions. This is a great way to give, especially if the IRA holder (1) doesn’t itemize deductions on their income tax returns and (2) if their IRS mandated required minimum distribution (RMD) gives them more income and tax than they want in a particular year. For those non-itemizers, it’s effectively like getting a deduction because while the distribution counts towards their RMD, it is NOT included in their gross income as it normally would be. The key here is making sure that your IRA institution DIRECTLY transfers the funds to the charity and not to you as a “middle man.”

A traditional IRA is also a great gift to leave to charity at your passing. If the IRA was left to an individual, that beneficiary would likely owe income taxes on the IRA proceeds. Since charities don’t pay income tax, the full benefit of IRA proceeds will go to the charity. Because Roth IRAs grow tax-free, they are better left to individual beneficiaries.

Answer provided by Andrew M. Fussner, Esq. 
Vice President of Estate Settlement
American Heart Association

To submit a Planning from the Heart question, email plannedgiving@heart.org or call 1-888-227-5242.
William (Bill) Jaeger’s heart has abruptly stopped in cardiac arrest seven times. But that’s not what makes Doris, his devoted wife of 39 years, cry when she tells his “heart story.” Her voice cracks when she speaks about their gratitude for his life today.

It’s gratitude for his colleagues performing CPR for 45 minutes and administering five shocks that saved Bill after he collapsed while working as a pharmacist in a hospital.

“They almost gave up on me,” Bill says. “But one of the pharmacy technicians saw my breathing tube had moved and knew I was fighting. The fifth shock brought me back.”

He then received an internal defibrillator and pacemaker — and a sober notice from his doctor: “You’re on borrowed time now.”

Despite this health scare, Bill returned to work. And he continued going after the next two cardiac arrests. Then he had his fourth, sustaining the most physical damage.

“During his fourth arrest, his face hit the step leading into our kitchen as he fell,” Doris says. “When I rolled him over, all I saw was blood. I panicked, not knowing where or how to begin helping. The next day, I called his department head and informed him that Bill wouldn’t be returning to work.”

“As after each cardiac arrest, it took longer to recover. He was moving slower, not able to do as much. Each one takes a toll on the heart.”

Yet another cardiac arrest led to a 13-hour cardiac ablation to correct Bill’s heart rhythm. Scarring in and around his heart from unknown causes and so many cardiac arrests meant that Bill was still living on borrowed time. Doctors informed Bill and Doris that their best option would be a heart transplant.

For more than 10 months, Doris lived in constant fear that the next arrest would be Bill’s last. He survived two more arrests.

And then, finally, he got a call on Sept. 20, 2014 that a donor heart was available.

“There is a roller coaster of emotions that you go through while you wait for a donor,” says Doris, her voice cracking. “The biggest emotion is that in order for your transplant to occur, another family will have to endure a terrible loss. Not a day goes by that we don’t think about that other family.”

Bill received the heart of a 30-year-old man that day, and as his new “heart journey” has begun, he is determined to pay it forward.

“I’ve been given a second life,” he says. “I have a lot of things that I want to accomplish and a lot of time on my hands.”

Retired, Bill and Doris are eager to accomplish as much community service as they can handle. They’re active in their church, Schwarwald Lutheran, and volunteer at the Exeter Township Food Pantry. Bill also serves in several capacities in the Exeter Township Lions Club, and Doris helps coordinate services for homeless families served at their church. Through Thrivent Action Teams, they helped rally 44 community service projects last year and hope for more this year.

Bill and Doris have also established a bequest in their estate plan to support the American Heart Association.

“It’s important to acknowledge how blessed we are to have talented doctors who can turn your life around and make miracles happen,” Doris says. “But those miracles are the result of many! We wish to express our thanks to the American Heart Association for its funding of research, the Hospital of the University of PA and its dedicated staff, our devoted family and faithful friends whose prayers helped make our miracle possible, and most especially for organ donors and their families.”

Bill and Doris say they have always felt a responsibility to give back, but now they have no choice. “There’s no way to pay it forward for all the blessings we’ve received,” Doris says. “But we try.”

To receive our complimentary Will and Estate Planning Guide, please mail this form to:
American Heart Association, Charitable Estate Planning, 7272 Greenville Avenue, Dallas TX 75231-4596
Or email us at plannedgiving@heart.org or contact us at 1-888-227-5242.
Turkey Medallions with Sweet Potato-Walnut Mash

Serves 4 | 3 ounces turkey, ¾ cup mash, and 1 tablespoon sauce per serving

- ½ teaspoon salt, divided use
- ½ teaspoon pepper, divided use and pinch of pepper
- 1 1-pound turkey tenderloin, all visible fat discarded, cut crosswise into 8 medallions
- 2 teaspoons olive oil
- 2 medium sweet potatoes, peeled and thinly sliced
- 1 medium onion, thinly sliced
- 1 large Granny Smith apple, peeled and thickly sliced
- ¼ teaspoon ground cinnamon
- ¾ cup unsweetened apple cider or 100% apple juice, divided use
- ¼ cup chopped walnuts, dry-roasted (lowest sodium available)
- 1 tablespoon coarse-grain mustard
- 2 tablespoons minced green onions (green part only)

Sprinkle ¼ teaspoon salt and ¼ teaspoon pepper over both sides of the turkey.

In a large skillet, heat the oil over medium-high heat, swirling to coat the bottom. Cook the turkey for 2 minutes on each side, or until browned. (The turkey won’t be done at this point.) Transfer to a large plate.

In the same skillet, stir together the sweet potatoes and onion. Reduce the heat to medium. Cook for 7 minutes, or until the onion is golden, stirring frequently.

Stir in the apple, cinnamon, and the remaining ¼ teaspoon salt and ¼ teaspoon pepper. Cook for 5 minutes, stirring frequently.

Place the turkey medallions among the sweet potato and apple slices. Pour in ²⁄₃ cup cider.

Bring to a boil, still over medium heat. Reduce the heat and simmer, covered, for 3 to 5 minutes, or until the turkey is no longer pink in the center and the sweet potatoes are tender. Remove from the heat. Transfer the turkey to a separate large plate, leaving the sweet potato mixture in the skillet. Cover the turkey loosely to keep warm.

Using a potato masher, mash the sweet potato mixture. Stir in the walnuts. Transfer the sweet potato mixture to plates.

Quickly pour the remaining ¼ cup cider into the skillet, scraping to dislodge any browned bits. Stir in the mustard, green onions, and final pinch of pepper. Remove from the heat.

Serve the turkey on the sweet potato mixture. Drizzle the sauce over the turkey.

NUTRITION ANALYSIS (per serving)

- Calories: 338
- Total Fat: 8.0 g
- Saturated Fat: 1.0 g
- Trans Fat: 0.0 g
- Polyunsaturated Fat: 4.0 g
- Monounsaturated Fat: 2.5 g
- Cholesterol: 70 mg
- Sodium: 475 mg
- Total Carbohydrates: 36 g
- Dietary Fiber: 5 g
- Sugars: 17 g
- Protein: 31 g
- Dietary Exchanges: 1½ starch, 1 fruit, 3 lean meat

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