



Atrium  
Medical Center

F O U N D A T I O N

# LEGENDS

**FROM THE HILL TO THE ATRIUM**

*A Tribute to the Men and Women  
Who Made It Happen*

ISSUE 25

*Annual Estate & Tax Planning  
Professional Seminar*

*For 25 years, Atrium Medical Center Foundation has hosted the Annual Estate & Tax Planning Professional Seminar for professional advisors in our region. The first seminar took place in 1999.*

But it was an incident years earlier that actually led to the idea. In 1980, local attorney and CPA Candice DeClark Peace was in a life-threatening car accident and taken to Middletown Regional Hospital. There, she underwent the first of two brain surgeries. The medical care she received there was outstanding, she says.

Years later, Candy was asked to serve on the planned giving committee for the hospital's Foundation. "I quickly said yes! I've always had such a strong allegiance to the hospital and the people who work there. I wanted to give back to them for the expert care they had given me," she says.

Tasked with finding ways to increase the Foundation's planned gifts, Candy had an idea. Maybe the Foundation should establish relationships with the community's professional tax advisors, lawyers, and financial experts. As an attorney and CPA, she knew that these professionals were sometimes asked by their charity-minded clients to recommend worthwhile causes when considering their estate plans.



## A Way to Attract Friends

Candy always believed that to attract funds, you need to attract friends. So she suggested the Foundation host an annual seminar that would provide these professionals with the continuing education credits they needed to renew their licenses.

“I figured that because the education would be free, the Foundation would generate good will. In return, maybe these professionals would remember the Foundation the next time they were asked to recommend a worthwhile charity,” she explains.

Foundation board member Kathleen Dobrozsi Romans chaired the first Estate & Tax Planning Professional Seminar at Stefano’s Holiday House in Middletown, with about 40 professionals in attendance. The event included breakfast and lunch at no cost, per Candy’s insistence. “When you’re trying to build friendships, you don’t ask for money,” she believes.

It was a risk that paid off.

Today, 25 years later, the annual seminar attracts more than 400 professionals from Butler, Warren, Hamilton, Montgomery, and Miami counties and beyond. Attendees range from those working in a two-person office in Middletown to others working in a firm of 2,000 professionals with offices throughout the country. Based on their feedback, attendees are immensely grateful for the chance to get the continuing education they need at no cost, saving each participant hundreds of dollars. They also appreciate the opportunity to meet with friends and colleagues for the day, making the seminar both fun and educational.



As hoped, the benefits go both ways. Based on careful research by the Foundation:

- Relationships gained from the seminars have resulted in \$15 million in charitable gifts to the Foundation over the past 25 years.
- Membership in the Heritage Society (those who have included the Foundation in their will or estate plan) has grown nearly tenfold to 110 members, as of July 2023.
- More than 85 endowments have been established as of May 2023. With an estimated value of \$10 million, they generate an annual income of more than \$500,000 for the Foundation's mission.
- Increased awareness about the benefits of planned giving, along with advisor education on advanced tax planning, has resulted in more charitable gifts staying local and strengthening our entire community.

These generous gifts play a major role in enabling the Foundation to fulfill its mission of building healthier communities in Southwest Ohio.

## A Year-round Effort

In 1999, a small Foundation team led by executive director Linda Baxter stepped up to help make the first seminar happen. They supported dedicated committee members, board members, and volunteers in creating a worthwhile experience for seminar guests — a collaboration that continues today.



Throughout the year, the planning committee meets to decide seminar topics and identify speakers. At the same time, Foundation staff is securing the venue, compiling data, processing registrations, preparing handouts, arranging meals, determining head counts, and completing other behind-the-scenes tasks that are critical to a smooth seminar.

Not even a pandemic could stop the dedicated team. In 2020 and 2021, thanks to an ongoing partnership with Prestige AV and adaptability from speakers and sponsors, the seminar went online, reaching a record attendance of more than 450 participants (since space limitations weren't an issue).

Committed sponsors help defer the costs for the ever-growing event, now typically held the first Friday in November at the Savannah Center in West Chester. Many sponsors have been part of the seminar since the beginning, including Clark Schaefer Hackett and financial advisor Peter McColgan. First Financial Bank, Johnson Investment Council, Lincoln Financial, and Katz Teller Law are all long-time supporters.

## Listening to Improve

Feedback is necessary for an event that is repeated every year. It indicates what went right, and what should be improved. In the seminar's 25 years, end-of-the-day feedback is nearly always glowing:

*Speakers were excellent*

*Extremely well organized*

*It was a good day!*

*Even the food was great!*

*What worked well? Everything!*

Negative comments are rare. But in 1999, at the conclusion of the first seminar, one criticism was received: “Did not like that the roast beef sandwiches had mayonnaise already on them.” All these years later, the planning committee still chuckles about it. But they’ve taken the feedback to heart. “Since then, we’ve not served sandwiches that already have condiments on them!” Candy reports.



## Expect the Unexpected

As a frequent seminar chair and long-time volunteer, local tax attorney William Keck, JD, has attended countless 7:30 a.m. planning meetings. “This seminar doesn’t just happen. It’s an enormous amount of work by many dedicated people. We work hard to determine topics that are most relevant to attendees, and to find top-notch speakers to present those topics,” he says. One such speaker, Bill Freedman, JD, was the star attraction for many, many years, says Bill. “He was so dedicated to his speaking role and did a fantastic job,” he adds.

But the planners learned that despite meticulous planning, you still need to expect the unexpected.

Bill laughs when he recalls the year their speaker regarding Ohio’s new tax code had to cancel at the last minute. “I desperately contacted every tax attorney I knew to fill in. Several were willing, but they didn’t have enough time to prepare. It’s a complex topic, and it’s daunting to present to hundreds of professionals.” In the end, he and two of his associates scrambled for a solution and saved the day by covering the topic themselves as a panel discussion.



Another memorable year, the planning committee arranged for the Ohio Highway Patrol to plant illegal drugs among the audience, then brought in their drug-sniffing dog to find them. “That was especially fun,” Candy recalls.



## Mission Accomplished

From the relationships formed, the charitable gifts secured, and the good will established, no one would dispute that the seminar has become a win-win-win in its 25 years — with more achievements to come in the years ahead. As Atrium’s Foundation works more closely with Premier Health’s other three Foundations, future seminars will reach even more advisors — and help to retain more charitable gifts in Southwest Ohio.

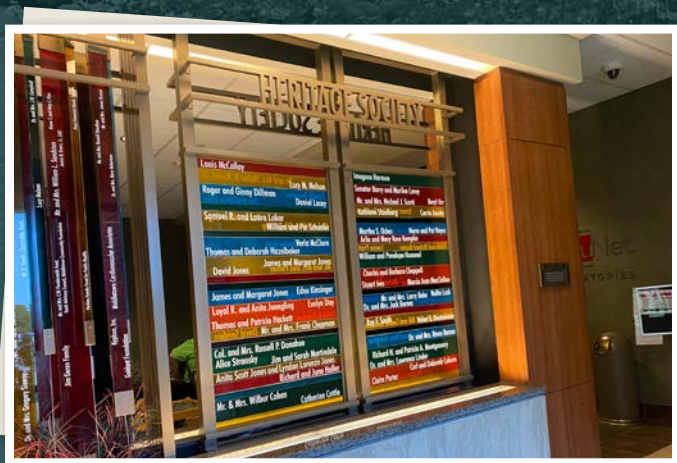
Bill effectively sums it up in this way. “This seminar is a thank you to the professionals in the area for their support of Atrium Medical Center — not only for their help with their charity-minded clients, but also for their personal charity to the mission of the hospital.”

Mission accomplished.

This article is the 25th in a series of profiles celebrating the 2017 centennial anniversary of Atrium Medical Center (formerly Middletown Hospital and Middletown Regional Hospital). The series honors the men and women whose civic-mindedness and genuine caring for others helped Greater Middletown grow and contributed to the first-class medical center the region boasts today.

**Past Legends focused on:** Paul Galeese, Issue 1; E.O. Bauer, MD, and John L. Bauer, MD, Issue 2; Educating Our Caregivers, Issue 3; Russell L. "Rusty" Malcolm, MD, and Albert S. Malcolm, MD, Issue 4; Ann and Arthur Bidwell, Issue 5; Atrium Auxiliary Middletown, Issue 6; Dr. Dick and Charlotte Nisbet, Issue 7; The Wilbur Cohen Family, Issue 8; Middletown Area Federation of Women's Clubs, Issue 9; Dolly Frieman Casper, Issue 10; The Sawyer Family, Issue 11; Southwest Ohio Businesses, Issue 12; Dr. Raymond and Jean Anne Kieffhaber, Issue 13; Richard "Dick" Slagle, Issue 14; Celebrating 100 Years, Issue 15; The Levey Family, Issue 16; Walter H. Roehlt Jr., MD, Issue 17; Atrium Medical Center Foundation, Issue 18; The Breiel Family, Issue 19; Our Medical Staff, Issue 20; William Dwain Langworthy, MD, Issue 21 The Chapple Family, Issue 22; Roger and Virginia Dillman, Issue 23; and Dr. Louis Skimming Sr. and Dr. Louis Skimming Jr., Issue 24.

*Special thanks to the W.E. Smith Charitable Trust for partial funding to produce Legends.*



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