

OMSNIC's agent network gives back in honor of Dr. Swift



Dr. James Q. Swift

Throughout its history, OMSNIC has given back to the oral and maxillofacial surgery specialty in many ways, including through its support of the OMS Foundation. OMSNIC's independent insurance agents have likewise supported the Foundation over the years. Ron Backer, Chairman Emeritus of Gracey-Backer, Inc., in Delray Beach, Fla., led the first OMSNIC agent donation – a five-year pledge that netted \$50,000 for the OMS Foundation – 33 years ago. He also spearheaded subsequent donation campaigns in 1999, 2004 and 2015, which collectively garnered over \$164,000 for the Foundation. Now, the torch has been handed down as the fifth pledge campaign was co-chaired by Ron Backer's son, John Backer, Chief Executive Officer of Gracey-Backer, Inc., alongside Ted Dyste, President and Chief Executive Officer of Dyste Williams.

Collectively, the OMSNIC agents have pledged a five-year donation of \$50,000 in support of the OMS Foundation. The agents are eager to give back to the specialty. The donation is made to honor the leadership and legacy of James Q. Swift, DDS, FACS, outgoing OMSNIC Board Chair who has served in the role for more than a decade. The 2024 AAOMS Annual Meeting in Orlando, Fla., was dedicated to Dr. Swift to honor his dedication and service to the OMS specialty. Dr. Swift is a past Director of the OMS Foundation and served on the OMSNIC Claims Committee for over 20 years. Previously, he has held the titles of President and Director of the American Board of Oral and Maxillofacial Surgery, President of the American Dental Education Association, and Chair and Officer of the AAOMS Faculty Section.

Currently, Dr. Swift trains residents as a Professor at the University of Minnesota School of Dentistry, where he served as Director of the Division of Oral and Maxillofacial Surgery for 25 years. He also sits on the board of the Gorlin Syndrome Alliance and chairs its Medical and Scientific Advisory Committee.

"We have been enriched personally and professionally by Dr. Swift's unwavering commitment, visionary guidance and tireless efforts," said Dyste. "This donation serves as both a token of appreciation for Dr. Swift's leadership and the support of our OMS policyholders."

John Backer expressed a deep appreciation for Dr. Swift's leadership, a sentiment shared by the OMSNIC agents. "This gesture underscores our gratitude for Dr. Swift's leadership and his understanding of the importance of partnership with the agent network. His guidance instilled confidence and trust among AAOMS members, helping make OMSNIC the success it is today," said Backer. ■

Contact us

info@omsfoundation.org • OMSFoundation.org • 847-233-4304



Brett Ferguson,
DDS, FACS
OMS Foundation Chair

In the ever-evolving field of oral and maxillofacial surgery, the OMS Foundation stands as a beacon of innovation and dedication. Committed to advancing research, education and clinical practice, the Foundation plays a pivotal role in shaping the future of our specialty.

At its core, the OMS Foundation is driven by a mission to

Embracing future: Vision for 2025 and beyond

support and enhance the practice of oral and maxillofacial surgery through robust research initiatives and educational programs. By fostering collaboration among researchers, educators and practitioners, the Foundation aims to accelerate scientific discoveries and improve patient care.

As we approach 2025, the OMS Foundation is embarking on an ambitious journey. Central to this endeavor is the development of a new strategic plan, meticulously crafted to align with our evolving mission and goals. This plan will not only reaffirm our commitment to scientific excellence but also pave the way for innovative new programs that

will shape the future of oral and maxillofacial surgery.

The upcoming strategic planning process is set to be a milestone event for the Foundation. Drawing upon the insights and expertise of leaders within our specialty, the OMS Foundation's Board will undertake a comprehensive assessment of its mission and historical achievements. This introspection will guide the formulation of strategic initiatives that are poised to redefine how we support and advance the field.

At its heart, the OMS Foundation thrives on its diverse and dedicated community. Researchers, educators and practitioners come together under its

umbrella, united by a shared passion for scientific inquiry and patient-centered care. This collaborative spirit is instrumental in driving meaningful advancements in oral and maxillofacial surgery.

In the years ahead, the OMS Foundation remains steadfast in its commitment to excellence and innovation. Through strategic planning and community-driven initiatives, we are poised to elevate the practice of oral and maxillofacial surgery to new heights. As we forge ahead, guided by our mission and the collective expertise of our leaders, the Foundation will continue to lead by example, making a lasting impact on our specialty and beyond. ■

Legacy giving helps Dr. R.V. Walker's vision endure

The OMS Foundation welcomed two new legacy donors to its R.V. Walker Society in the third quarter of 2024.

As legacy giving gains in popularity, this year's new Walker Society members share a compelling desire to give back to the specialty through support of the Foundation. By including a gift to the Foundation in their estate plans, they help sustain Dr. Walker's vision for a vibrant, responsive and solvent

Foundation to champion innovation and support OMS-specific research and education in perpetuity.

New legacy donors in 2024 include:

- Drs. David L. Basi and Julie A. Chavez
- Drs. David A. Fenton and Jodi C. Levy

Walker Society members, OMSFIRE donors and Foundation volunteers were welcomed

during the 2024 Annual Meeting for a VIP reception, which included a cake commemorating what would have been Dr. Walker's 100th birthday.

Visit [OMSFoundation.org/Planned-Giving](https://www.omsfoundation.org/Planned-Giving) to learn more about legacy giving options and consult your financial advisers for guidance on including a gift to the Foundation in your estate plan. ■



Drs. David L. Basi and Julie A. Chavez

"Julie and I wanted to leave a lasting legacy by supporting the OMS Foundation's mission of promoting research and education. Just as we have benefited from the efforts of those who came before us, it is now our responsibility to secure the future of our specialty for the next generation."



Drs. David A. Fenton and Jodi C. Levy

"Being an OMS Foundation contributor through the R.V. Walker Society pledge allows us to provide a greater contribution to our specialty without as much of a financial impact on our current budget. The OMS Foundation is a great organization that is funding the scientific discoveries that will define the future of oral and maxillofacial surgery. The R.V. Walker Society allows us to provide a much more significant financial contribution as well as a personal legacy."

2024-2025 OMS Foundation Board of Directors

Brett L. Ferguson, DDS, FACS, *Chair*
David L. Basi, DMD, PhD, *Vice Chair*
Jeffrey H. Wallen, DDS, *Treasurer*
James A. Baker, DDS

Gary F. Bouloux, DDS, MD, FRACDS, FRACDS (OMS), FRCS (Eng), MDS, FACS
Jasjit K. Dillon, DDS, MBBS, FDSRCS, FACS
Edward J. Miller Jr., DMD
Gregory M. Ness, DDS, FACS

Rawle F. Philbert, DDS, FACS
Peter A. Vellis, DDS
Artem Krutyanksy, DMD, MD, MPH, ROAAOMS Liaison
Karin Wittich, CAE, *Executive Director*

Annual Meeting and September fundraising efforts successful

Inspired by a gift-match challenge from Beacon Oral Specialists, members of the AAOMS community responded with generous donations to the OMS Foundation during the Annual Meeting. Beacon Oral Specialists pledged to double every donation made in September up to \$35,000. Donors quickly surpassed that goal, as more than \$43,000 was raised during September alone. Twenty donors gave in-person at the Foundation's booth at the Annual Meeting in Orlando, Fla.



The gift-match commitment from Beacon Oral Specialists inspired Foundation donors to give because of the greater impact their support would provide. The Foundation extends its gratitude to

Beacon Oral Specialists and all the donors who participated in the September gift-match challenge.

Thirteen donors have joined the OMSFIRE roster in 2024, including:

Silver OMSFIRE (\$5,000/year for five years):

- Dr. Maximillian Beushausen
- Dr. Aaron Brinster
- Dr. Robert and Suzanne Moskal
- Dr. Lisamarie Sarhangian



Bronze OMSFIRE (\$2,500/year for five years):

- Dr. M. Todd Brandt
- Dr. James E. Freeman IV
- Dr. Jeremiah and Mrs. Molly Johnson
- Dr. Thomas A. McDonald
- Dr. Shravan K. Renapurkar
- Dr. Michael L. Rosenthal
- Dr. Brett M. Shirley
- Arizona Society of OMS
- Maryland Society of OMS



The Foundation extends its gratitude to every donor who stopped by its booth, attended an event or donated remotely in September, and to Beacon Oral Specialists for a successful gift-match challenge. ■

GIVE recipient reflects on humanitarian experience

by Vickas Agarwal, DDS, MD, Global Initiative for Volunteerism and Education (GIVE) award recipient

Traveling to Dhaka, Bangladesh, with the Smile Bangladesh team was a milestone for me, made possible through a GIVE award from the OMS Foundation. Thanks to the generosity of the Foundation's donors, I was able to fulfill my longstanding aspiration to engage in global surgery by participating in a mission trip. I have long been drawn to the idea of contributing to surgical care in underserved communities worldwide. However, financial constraints often hindered such endeavors, especially during residency.

The award from the OMS Foundation alleviated this burden, providing for my travel expenses and essential support for accommodation, meals and supplies. Without this assistance, joining Smile

Bangladesh in Dhaka would have been nearly impossible. The funds not only facilitated my travel but also allowed me to actively participate in the mission of providing vital surgical care to those in need.

Every patient we treated underscored the impact of our presence and the importance of our work. Equally valuable was the opportunity to work alongside mentors with diverse backgrounds from outside my program. Gaining exposure to different techniques to accomplish the same goals gave me new perspectives and collaborating with the dedicated professionals of Smile Bangladesh provided insights beyond just surgical techniques.

Their commitment to their community and resilience in challenging circumstances left a lasting impression on me. Reflecting

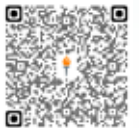
on my time in Dhaka, I am filled with gratitude – for the opportunity to serve, for the lessons learned and for my generous colleagues who helped make this experience possible. It has reinforced my commitment to global surgery and deepened my understanding of the profound impact we can make when we come together to serve those in need. ■



Vickas Agarwal, DDS, MD



Donations to the Alliance helped raise \$10,000 in 2024 to fund GIVE stipends. Visit OMSFoundation.org/GIVE to learn more.



Foundation Board welcomes new AAOMS Trustees

The OMS Foundation welcomed Edward J. Miller Jr., DMD, and Gregory M. Ness, DDS, FACS, to its Board of Directors in September, filling vacancies left by retiring members Martin E. Eichner, DDS, and Debra M. Sacco, DMD, MD. Dr. Miller, District I Trustee, and Dr. Ness, District IV Trustee, will both serve as AAOMS Trustees to the Foundation.

Drs. Miller and Ness began their terms at the close of the AAOMS Annual Meeting, supported by Chair Brett L. Ferguson, DDS, FACS; Vice Chair David L. Basi, DMD, PhD; and Treasurer Jeffrey H. Wallen, DDS. Five Directors-at-Large and a ROAAOMS Liaison round out the Foundation's 2024-25 Board of Directors.

2024 awards presented at AAOMS Annual Meeting in Florida

Congratulations to the recipients of the 2024 OMS Foundation Awards, who were recognized onstage at the 2024 AAOMS Annual Meeting Opening Ceremony in Orlando, Fla.



Louis K. Rafetto, DMD, MEd (center)

Torch Award

The Foundation's most prestigious award recognizes individuals who have made significant contributions

and/or provided exemplary service to the OMS Foundation. This year's honoree is Louis K. Rafetto, DMD, MEd. Dr. Rafetto's dedication to the OMS Foundation most recently culminated in his term as Chair of the Foundation Board from 2021 to 2023, prior to which he served as a board member. Following his term as AAOMS President in 2016, he helped to develop and implement the Foundation's Strategic Alliance with AAOMS, which was enacted in 2018. As a longtime global surgical volunteer, Dr. Rafetto has played a key role in shaping the Foundation's Global Initiative for Volunteerism and Education, or GIVE, Program. He also continues to serve on the OMS Foundation Committee on Humanitarian Programs and is a Silver OMSFIRE donor.

Foundation's Student Research Training Award program and serving on the Foundation's Committee on Research. She continues to advance the OMS specialty as an annual donor to the Foundation.



W. Mark Tucker, DDS

Gerald E. Hanson Outstanding Service Award

Named for Dr. Gerald Hanson, who chaired the OMS Foundation from 2005 to 2007 and spearheaded an innovative and successful annual giving campaign, the 2024 award recognizes W. Mark Tucker, DDS, for his service, advocacy and extraordinary stewardship of its mission. As an OMS Foundation Director from 2008 to 2010, Dr. Tucker served as an Ambassador and a member of every committee. In 2021, he rallied the members of the Florida and Southeastern Societies of OMS to contribute more than \$50,000 to the Foundation to honor Dr. James and Judy Davis. Dr. Tucker and his wife Tina continue their support as Silver Annual Donors and members of the R.V. Walker Society. Dr. Tucker served as AAOMS President in 2007 and is a past president of the Florida Society of OMS.

Dr. David Stanton Resident Research Award

Honoring the late Dr. David Stanton, who taught, mentored and inspired students



Corissa Chang, DDS, MD

and colleagues at the University of Pennsylvania for 24 years, this award recognizes the author(s) of the most outstanding resident research paper published in the *Journal* during the previous year. The *JOMS* Editorial Board honored Corissa P. Chang, DDS, MD, who authored "Comparative Efficacy of Obstructive Sleep Apnea Patients Undergoing Multilevel Surgery Followed by Upper Airway Stimulation Versus Isolated Upper Airway Stimulation." She submitted the paper to the *Journal* during her residency at the University of Pennsylvania, where she is currently in her fifth year. Dr. Chang received



Pooja Gangwani, DDS, MPH (center left) and Joshua Dobbins, DMD (center right)

complimentary registration and travel reimbursement to the Annual Meeting and a \$500 cash award.

Daniel M. Laskin Award

In recognition of the most outstanding article published in the *Journal* in 2023, the *JOMS* Editorial Board honored the authors of "Is Recreational Marijuana Use Associated with Changes in the Vital Signs or Anesthetic Requirements During Intravenous Sedation?"

Pooja Gangwani, DDS, MPH

David Lillian, DDS

Joshua Dobbins, DMD

Changyong Feng, PhD

John Vorrasi, DDS

Antonia Kolokythas, DDS, MSc, MSed, FACS



Tara Aghaloo, DDS, MD, PhD

Research Recognition Award

This annual award recognizes those whose scientific contributions have led to a

better understanding of basic disease processes and improvement of care for patients with maxillofacial disorders. This year's recipient is Tara Aghaloo, DDS, MD, PhD. Dr. Aghaloo's work in oral and maxillofacial surgery has been supported by the Foundation many times throughout the years, through six Research Support Grants, the Stephen B. Milam Award and Daniel M. Laskin Award. Her leadership extends beyond clinical practice, as she serves as an Associate Editor of the *Journal of Oral and Maxillofacial Surgery* and has previously served as the President of the Academy of Osseointegration. Since early in her career, Dr. Aghaloo has advocated for the next generation of OMSs and researchers, directing the



2024 Kelly Scholarship Recipients

2024 Kelly Scholarship Recipients (left to right) Megan LeMoine, Mariah Anderson, Emily Munk, Gillian Linton, Aram Missaghian, Diane Szeto, Tyler Rhoades, Xuheng "Louie" Song and Adam Hockaday were welcomed to the AAOMS and OMS Foundation community during the 2024 Annual Meeting in Orlando, Fla.

Alliance celebrates 30-year anniversary at Annual Meeting



2024 Alliance Committee

This year, the OMS Foundation Alliance celebrates its 30th anniversary, marking three decades of collaboration between OMSs, their spouses, families, allied staff and friends. The Alliance, which is the Foundation's primary outreach and fundraising partner, is committed to promoting the health and social issues related to the specialty of oral and maxillofacial surgery. But the Alliance also has made priceless contributions to building the AAOMS community, starting in its very first year of existence.



OMS Foundation Chair Brett L. Ferguson, DDS, FACS, and Mrs. Olga Schwartz, 2023-2024 Alliance Committee Chair

History of the Alliance

In 1993, the Foundation enlisted Mrs. Madelyn "Mady" Donoff, wife of 1990-91 Foundation Chair Dr. R. Bruce Donoff, to lead a new partnership organization of OMS spouses and friends. Mrs. Donoff was a speech-language pathologist and guidance counselor at Brookline Public Schools in Massachusetts. Within a year, she had



2024 Health Walk participants

enlisted Linda Dallamora, Ruth Evans, Joyce Jackson, Debra Keen, Lois Kelly, Sheila Laboda, Nat Marks, Sara Matzkin and Diane Sinn to her steering committee and recruited almost 400 members in the Alliance's initial membership drive. The Alliance's first event was a hospitality suite for prospective members that welcomed over 200 charter members at the 1994 Annual Meeting in Denver, Colo.

"The talent and energy of spouses and friends present a great resource that, until now, has been largely untapped by the specialty. We have great plans and expectations for the Alliance and believe it will be a significant benefit to oral and maxillofacial surgery," said Mrs. Donoff in 1994 regarding the Alliance's beginnings.

Since the beginning, Alliance members have understood the unique challenges of the OMS specialty. When the Foundation recognized Mrs. Donoff in 1998 with its highest honor, the Torch Award, for exemplary service in fostering the organization's goals, she mentioned some of these challenges – namely, living with someone who "stored lab samples in our freezer and practiced tying surgical knots on the legs of our kitchen table."

The Alliance's present

Among the Alliance's current tasks are financing stipends for residents who travel internationally to provide humanitarian healthcare through the Global Initiative for Volunteerism and Education program. Additionally, the Alliance funds (GIVE) travel expense reimbursements for resident spouses attending the Annual Meeting through the Norma L. Kelly Scholarship program. Programs such as GIVE and the Kelly Scholarships have allowed AAOMS's members to experience new areas of the specialty, advance in their careers and travel the world to give vital surgical care to those in need.

The Alliance gathered friends old and new during the 2024 Annual Meeting in Orlando, Fla., under the leadership of 2023-24 Alliance Committee Chair Mrs. Olga Schwartz.

The Alliance committee and event participants warmly welcomed this

year's nine Kelly Scholars into the AAOMS community, providing them the VIP treatment throughout the Meeting's events. They were greeted as guests of honor at the Alliance's daily Health Walks along International Drive, networking



2024 Health Walk participants

breakfasts at The Pub and the Luncheon and FUNraiser for GIVE at Primo Orlando.

At the Luncheon, guests enjoyed a farm-to-table Italian dining experience followed by a presentation by Vickas Agarwal, DDS, MD. Dr. Agarwal shared his captivating story of traveling to Dhaka, Bangladesh, to volunteer with Smile Bangladesh, a nonprofit dedicated to caring for children and adults afflicted with facial cleft deformities in the South Asian nation. He thanked the Alliance, which helped him cover his travel expenses to Bangladesh through a \$2,500 GIVE stipend, for helping make the trip a reality.

Looking toward the future

The first 30 years of the Alliance have built countless bridges within the OMS community and provided a source of inclusion for family, friends, staff members and OMSs alike. To learn more about the Alliance and its initiatives, visit OMSFoundation.org/Alliance. All are welcome to participate in Alliance events at the 2025 Annual Meeting in Washington, D.C.

Your donations to GIVE support travel stipends for OMS residents serving with approved international humanitarian healthcare teams. Learn more and donate at OMSFoundation.org/GIVE.



2024 Alliance Committee and Norma L. Kelly Scholarship Recipients

Enhancing your estate plan using charitable contributions



Jeff Wherry

by Jeff Wherry, Director of Planning & Research, MAI Capital Management

When looking at ways to optimize your estate plan, there are several charitable contribution strategies to consider, including charitable remainder trusts, private foundations and gifting appreciated property.

Charitable remainder trusts (CRTs) are vehicles for charitably inclined taxpayers who want to create an income stream for a longer period or for life, defer income taxes, create an income tax deduction and reduce federal estate tax exposure. CRTs are tax-exempt entities, so assets held in these trusts are not subject to income tax. The two types of CRTs to consider are Charitable Remainder Annuity Trusts (CRAT) and Charitable Remainder Unitrusts (CRUT). CRATs provide a fixed annuity payment to the non-charitable beneficiary and CRUTs provide a fixed percentage payment based on the fair market value to the non-charitable beneficiary.

The charitable lead trust (CLT) can be thought of as the reverse of the CRT because the charitable organization

receives the income payments, and the remaining amount is distributed to the non-charitable beneficiary. CLTs are vehicles for individuals who do not need a current income stream from the contributed assets and are looking to benefit a charity, generate an income tax deduction, reduce federal estate tax exposure or pass the assets onto non-charitable beneficiaries.

A private foundation is a nonprofit entity created and controlled by the donor who is tasked with ensuring that the foundation follows IRS regulations. Unlike a public foundation, which receives its funding from the general public, a private foundation usually has one source of funding.

Funding a private foundation will provide a charitable income tax deduction for any amount contributed up to 30 percent of the donor's adjusted gross income (AGI). Any amount above this limit can be carried over for five years. Donors also may be able to avoid paying capital gains taxes by donating highly appreciated assets to a private foundation. Also, when assets are contributed to a private foundation, they are excluded from the donor's estate and are not subject to either federal or state estate taxes.

Rather than gifting cash to a charitable organization, a more tax advantageous strategy may be to donate appreciated stock to avoid capital gains tax that would be due on the sale of the stock. For example, assume a donor wishes to make a \$100,000 gift to charity. The donor has stock that was purchased for \$20,000 and is now worth \$100,000. If the donor sold this stock, they would incur \$80,000 of taxable gain income. If the donor gifts this stock to charity, they will avoid the capital gains tax entirely. The limit on a charitable deduction for stock held more than one year is 30 percent of AGI. Any amount above this limit can be carried over for five years.

Although many studies show that donors are not primarily motivated by tax benefits, federal income, gift and estate tax laws do support America's charitable contribution tradition by providing significant tax benefits to donors. So, as you make plans for your family's future, it is important to take these possibilities into consideration and to work with a trusted professional to seek to maximize the impact to your estate. ■

MAI Capital Management, LLC, and Treloar & Heisel, LLC, are affiliated companies of Galway Holdings, LP. Investment Advice offered through MAI Capital Management, LLC, an investment adviser registered with the Securities and Exchange. MAI Capital Management does not provide legal advice. Insurance products offered separately through Treloar & Heisel, LLC, and Treloar & Heisel Property and Casualty.

This is for educational purposes only. Opinions and analyses are subject to change. Any suggestions contained are general, and do not take into account an individual's or entity's specific circumstances or applicable governing law, which may vary from jurisdiction to jurisdiction and be subject to change. Distribution hereof does not constitute legal, tax, accounting, investment or other professional advice.



DONATE TODAY



Your gift to the OMS Foundation supports research, education opportunities for residents and a strong academic sector. Donate now to DOUBLE YOUR IMPACT! Every gift to the Annual Fund received by December 31st will be matched by OMS Partners, LLC, up to a total of \$35,000.



Investing in
innovation.
Advancing the
specialty.



OMS Foundation
9700 W. Bryn Mawr Ave.
Rosemont, IL 60018
OMSFoundation.org