



## Alabama Healthcare Pioneer Robert Chapman Credits UM as the Foundation of his Success

Hailing from a small town in north Alabama called Lacey's Spring, Robert "Bob" Chapman's plan when he graduated from Cotaco High School in Somerville in 1959 was to enroll at The University of Alabama.

But after being offered a scholarship for academic honors from Alabama College, his plans changed, and he was off to Montevallo to study chemistry with triple minors in biology, mathematics and social science.

Fast forward 16 years, Chapman, LFACHE, became president and CEO of East End Memorial Hospital in Birmingham, Alabama. Eleven years later, in 1986, he would create Eastern Health System, Inc., a private not-for-profit regional integrated healthcare system serving the Birmingham-Hoover metropolitan area with a comprehensive range of healthcare programs, contract management and professional services, selected business ventures through three hospitals, a nursing home, home health and hospice care, an ambulatory surgery center, family practice residency program, family practice clinics and an assisted living/residential retirement facility.

Eastern brought in an annual net revenue of \$240 million and employed 1,800 people.

In his 37-year career, Chapman has sat on and chaired numerous regional and national boards, published multiple healthcare publications, had facilities such as the Robert C. and June Chapman Sports Medicine Facility at the University of Montevallo, named for him and won a plethora of honors and awards.

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### Make the Memory Count

Provide the path for UM students to benefit from a truly enriching college experience. Contact Kelli J. Holmes at [kholmes4@montevallo.edu](mailto:kholmes4@montevallo.edu) or 205-665-6215 to learn how.

## A free resource to make your will, and your legacy

Planned gifts provide sustained support to the University and help future generations of Montevallo students learn, grow and explore. Thanks to our new partnership with FreeWill, creating a lasting impact on our students is easier than ever. Using their self-help, online estate planning service, you can write a legal will in 20 minutes or less, 100% for free. It makes it simple to include the necessary language to create your planned gift and join our 1896 Society.

Scan the QR code or visit [freewill.com/montevallo](https://freewill.com/montevallo) to create your legacy.



## Are we already in your estate plan?

Every year the University of Montevallo Foundation receives bequests from generous donors who had not previously informed us that they included a gift in their estate plan. We would like to know of these gifts so we can thank you, offer you membership in our 1896 Society and discuss any specific designations you'd like your gift to support.

To record a bequest you've already made, scan the QR code or fill out the brief form at [freewill.com/record/montevallo](https://freewill.com/record/montevallo).



# FreeWill + University of Montevallo Foundation

## Real-time giving from your IRA

If you are 70.5 or older, you are eligible to create a Qualified Charitable Distribution (also known as a charitable IRA rollover) to support Montevallo students. QCDs are tax-advantageous gifts distributed from your IRA that make an immediate impact and can help you satisfy a Required Minimum Distribution. Using FreeWill's secure online resource, you can learn more and begin your gift — our tax information will already appear, and any other instructions will be clear and easy to follow.

Scan the QR code or visit [freewill.com/QCD/montevallo](https://freewill.com/QCD/montevallo) to get started.



## Donating appreciated stock

Donating stock is a mutually beneficial way to support Montevallo and our students while gaining favorable tax benefits. By donating stock rather than selling it and donating the cash, donors avoid paying a capital gains tax. Most of all, you'll make an immediate impact on our students and their Montevallo experiences. Use the free resource to learn more about the benefits of donating stock. If you're ready to get started, it will guide you through the process quickly and easily.

Scan the QR code or visit [freewill.com/stocks/montevallo](https://freewill.com/stocks/montevallo) to get started.





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## 1896 Society Reception

On Nov. 4, 2022, the University of Montevallo held its annual 1896 Society reception, the first one since having to halt on-campus events in 2020 due to the pandemic. This year's guest speaker was Dr. Clark Hultquist, chair and professor of history in the Department of Behavioral and Social Sciences.

1 Dr. Clark Hultquist speaks about his time as a professor at UM; 2 Foundation Board Member Dee Woodham and her husband Barry Woodham; 3 Foundation Board Member Paul Doran '68 and Bob Chapman '63; 3 Patti Williams '76 and her husband David Thompson; 4 Foundation Board Chair Karen Kelly '80 and Dean of the College of Arts & Sciences Dr. Ruth Truss '82.



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### DID YOU KNOW...

**After receiving bipartisan support**, the SECURE (Setting Every Community Up for Retirement) 2.0 Act was signed into law in late 2022, delivering dozens of new retirement-related provisions. The overarching goal of this new piece of legislation is designed to strengthen the retirement savings system by extending and expanding your saving opportunities. The law has several key provisions intended to enhance your ability to save for retirement, of those, here are a few notable areas of change:

- Increase in the required minimum distribution (RMD) beginning age to 73 in 2023 and 75 in 2025
- Higher retirement plan contribution limits for certain individuals
- Additional ROTH retirement plan options
- Expanded penalty exceptions for early withdrawal
- Ability to Roll over 529 assets to a Roth IRA for the 529 beneficiary

For more information please talk to your financial advisor or visit [finance.senate.gov](https://finance.senate.gov).

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To name a few, in 1987, he was awarded the Alabama Hospital Association's Gold Medal of Excellence. In 2006, he received the Distinguished Service Award from the Alabama Hospital Association. He received the American College of Healthcare Executives Executive Regents Award in 1992 and was named Administrator of the Year in 1996.

The UM National Alumni Association named him its Distinguished Alumni recipient in February 2000. That same year, the University of Alabama at Birmingham's National Alumni Association also named him its Distinguished Alumni. In 2004, he received the University of Montevallo's President Award for Exemplary Service as a Civic and Healthcare Leader and as a Distinguished Alumnus. And in 2012, the same year that his wife June died, he was inducted into the Alabama Healthcare Hall of Fame.

Chapman said the foundation of his success as one of Alabama's top healthcare leaders was Alabama College, which he graduated from in 1963.

"Montevallo gave me the opportunity to get a sound education," Chapman said. "When I started on my MBA at The University of Alabama in Huntsville, I had a core solid science background with business. That's where my accounting teacher talked me into going to UAB's School of Health Professions graduate program in hospital and health administration."

He received a master's of science in hospital and health administration from UAB in 1972.

Chapman was a proud Purple at Alabama College and played in the inaugural club basketball program. He was inducted into the Montevallo Athletics Hall of Fame in 2021 for meritorious service.

Chapman has been a donor to Montevallo for more than three decades.

His latest planned estate gift to the University is twofold. The gift will establish the Robert and June Chapman Endowed Coach, which will provide funds to support a full-time UM coach that's recognized as national coach of the year or conference coach of the year.

His other estate gift will establish the Robert and June Chapman Endowment for Disability Services. Funding will be used to help meet the specific needs of individuals or services on campus.

Chapman said it's important to give to Montevallo in perpetuity because Alabama College gave him the basis for his career. He feels it's his obligation to carry on the development of budding leaders and future professionals in various fields.

"To show support of scholarships, support of other programs and services, to enable the future development of not only local leaders but national leaders in various different fields – that's why I feel it's very important," he said. "It doesn't matter to me if my name is on it or not."

"I feel that it's not only my purpose and my mission, but it should be other people's mission to leave something behind from that standpoint."

Chapman's advice to current and future Montevallo students is to get involved with people, programs and organizations to develop people skills.

These are the keys to success.

"In my career and other people's careers, the key to success is your relationship with the people you surround yourself with. Those not only working with you but the people you become involved with."

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