

A Hoag Hospital Foundation Publication

SCANNER

WINTER EDITION

2016

Milestone Celebration

The opening of Hoag Health Center Irvine is a landmark moment for Hoag



hoag
Hospital
Foundation

HOAG
PROMISE

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LETTER FROM THE CHAIR

Dear Friends of Hoag:

This past September, Hoag celebrated the public grand opening of Hoag Health Center Irvine at Sand Canyon. If you haven't seen it, you must. Located across the street from Hoag Hospital Irvine, it is designed as a comprehensive and innovative "health care village." Of course, philanthropy is playing a role in bringing Hoag's renowned services and programs to Irvine.

I'm reminded of one of my favorite quotes from Henry Miller; "The moment one gives close attention to anything, even a blade of grass, it becomes a mysterious, awesome, indescribably magnificent world in itself."

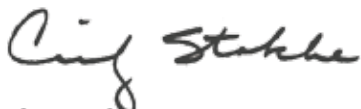
In each issue of *Scanner*, and during events like the opening of Hoag Health Center Irvine, we give close attention to our community of philanthropists. Their commitment and passion are tangible to the patients who come to Hoag for care. It is through the generosity of donors like Ginger and Bob Juneman, and many others you'll read about in this issue, that we have transformed Hoag into what it is today.

This issue also features the Toshiba Classic which has benefitted the Mary & Dick Allen Diabetes Center since 2011. And, we are also very pleased and excited to share highlights from the investiture ceremony of Dr. Allyson Brooks as the Ginny Ueberroth Executive Medical Director Endowed Chair, Hoag Women's Health Institute. Hoag's 11th endowed chair is special to me because it's directed to supporting women's unique health care needs.

I express my sincere gratitude to you for giving your attention to Hoag so that it has become an awesome, indescribably magnificent health care asset to all of Orange County. Thank you for taking action – in making a gift or volunteering your time – to move us closer to the Hoag Promise Campaign goal of \$627 million by 2020.

Together, we will make that happen.

Sincerely,



Cindy Stokke
Chair, Hoag Hospital Foundation Board



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COVER STORY

Milestone Celebration



The opening of Hoag Health Center Irvine at Sand Canyon is a landmark moment as we continue our purposeful growth by bringing Hoag's advanced care, technology and resources to the Irvine community.

Hoag donors, physicians and friends gathered on August 31 to tour the four adjacent facilities, located at 16105-16405 Sand Canyon Avenue, that make up Hoag Health Center Irvine. Hoag held a public grand opening attended by more than 3,000 community members on September 17.

Located across the street from Hoag Hospital Irvine and Hoag Orthopedic Institute, Hoag Health Center Irvine is designed to deliver a superior patient experience that is seamless, personal and convenient. Services, such as nurse navigators as well as a courtesy shuttle that easily links the Hoag Hospital Irvine campus, remove the stress and confusion of accessing multiple points of care for patients and their caregivers.

"Hoag Health Center Irvine is yet another example of our enduring promise," said Robert T. Braithwaite, Hoag president and CEO. "The Center is a tangible symbol of Hoag's promise to lead, innovate and transform by offering outstanding,

conveniently located specialized services where they are needed."

Hoag Health Center Irvine provides a rich array of specialized health care services that complement the acute care services across the street at Hoag Hospital Irvine:

The Ginger & Bob Juneman Pavilion houses Hoag Urgent Care, managed by Hoag Medical Group and King's Pharmacy & Compounding Center.

Hoag Family Cancer Institute offers patients a full range of advanced cancer therapies as well as access to new investigational treatments in alliance with USC Norris Comprehensive Cancer Center. The Healy Family Conference Room, named in recognition of Otis and Joann Healy's \$250,000 gift to support cancer care in Irvine, hosts in-person as well as interactive case conferences to benefit cancer patients.



Hoag Neurosciences Institute's Orange County Vital Brain Aging Program and The ONE Brain and Spine Center at Hoag Health Center Irvine give local patients access to a multidisciplinary team of experts closer to home. The programs now available are epilepsy, movement disorders and stroke.

Hoag Women's Health Institute combines progressive technology with patient education, comfort and exceptional care. Services include Hoag WOMANOLOGY + RestoreHIM® by Hoag and the Hoag Comprehensive Breast Center.

Jeffrey M. Carlton Heart & Vascular Institute brings its preeminent cardiovascular services to Irvine, reducing the stress that travel can place on patients and their families. Among the many services available are: Heart and Vascular Outpatient Services, including Echocardiogram, EKG, Holter Monitoring, Hoag Cardiac Rehabilitation, Hoag Vascular Ultrasound Lab and Peripheral Arterial Disease Supervised Walking Program.

For more information about how you can support Hoag Health Center Irvine in bringing the Hoag experience to the Irvine and South Orange County communities, please contact C.C. Hafner at 949-517-3178 or CC.Hafner@hoag.org.



16205

Ginger & Bob Juneman Pavilion



“When Ginger and I found ourselves at Hoag, people were there for us. It struck a chord. It was as simple as that.”

DONOR PROFILE

Grateful Givers

Philanthropists Ginger and Bob Juneman

When Ginger and Bob Juneman toured Hoag Health Center Irvine with their son, daughter and grandchildren, Bob remarked he never expected to see his name on anything other than his mailbox. Both from modest backgrounds – Ginger’s family operated orange groves in Riverside County and Bob’s mother worked her way up from teaching in a small town to serving as the curriculum coordinator for all Los Angeles County schools – they worked hard, raised their children and retired to enjoy their grandchildren.

A West LA Story

The couple met at UCLA where they both majored in physical education. Bob tried to get a date with Ginger, but her school schedule and social calendar were packed. He finally asked her to play tennis with him on a Sunday, to which she agreed. “I didn’t know he played on the tennis team,” she said with a laugh. Not just any tennis team. In 1950, the UCLA tennis team was the university’s first to win the national championship in any sport.

Ginger and Bob graduated from UCLA in 1951 and were married two years later in February 1953. He joined the Air Force where he was sent to Saudi Arabia. Not too many people can claim that they’ve dined with kings, but as a guest of Saud bin Abdulaziz Al Saud, Bob and his fellow officers enjoyed a memorable evening.

Good Decisions Pay Off

When he left the Air Force, Bob wasn’t sure of his next step. He had the foresight to save almost all of his overseas pay and enjoyed talking about investments with his stockbroker at Dean Witter. He joined the firm in 1960. His boss happened to be a USC rival, Otis Healy. Fortunately, they quickly became friends.

Bob started his career at Dean Witter as a broker in the Whittier, California office. He was promoted to branch manager and retired as the regional director for Southern California overseeing some 50 branch offices. “I was very fortunate to work for Dean Witter,” Bob recalls. “Otis and I were in the business at a good time. We worked hard and persisted through thick and thin. It paid off.”

Ginger worked as a secretary while Bob was serving our country. She then held down the fort with the kids at home

while Bob pursued his career. Bob retired in 1997 and, in 2004, at the urging of their son and daughter, he and Ginger moved to Costa Mesa to be closer to the family.

A Hoag Encounter

One night in 2005, when Bob became suddenly and seriously ill, he was rushed to the Joan & Andy Fimiano Emergency Pavilion at Hoag Hospital Newport Beach. He found himself among a group of physicians and nurses who treated him with compassion and exceptional expertise.

“I’d never spent the night in the hospital until I went to Hoag,” he says. “I didn’t know anything about hospitals and doctors other than you had to avoid them!”

He soon developed an interest in health care; specifically, how it was delivered at Hoag. He met up with his colleague, Otis, who recruited him once again, this time to join the Hoag Irvine/Orthopedics Campaign Advisory Committee, where he learned about the Hoag Benefactor program. He and Ginger knew Hoag was special and they became Hoag Benefactors with a \$1 million irrevocable estate gift in support of Hoag Health Center Irvine.

Ginger admits she was reluctant when they were approached with the idea of recognizing their gift by naming a pavilion at Hoag Health Center Irvine. But, when the couple realized the power of naming the Ginger & Bob Juneman Pavilion at Hoag Health Center Irvine to inspire others, they agreed. Since then, anonymous donors have made significant gifts to the Center. Even Bob’s former boss, Otis, made a generous gift to support the Hoag Family Cancer Institute at Hoag Health Center Irvine.

The way Bob looks at it, Hoag has given him and Ginger so much and they are glad to give back. “I enjoy everyone I’ve met at Hoag. I hold many of them to be good friends,” he says. “We’re ambassadors for Hoag.”

For more information about how you can support Hoag Health Center Irvine in bringing the Hoag experience to the Irvine and South Orange County communities, please contact C.C. Hafner at 949-517-3178 or CC.Hafner@hoag.org.

TOSHIBA CLASSIC

Above Par Philanthropy

**2016 Toshiba Classic Presented by Kingston Technology
Brings the Best of the Game While Benefiting Hoag and the Greater Community**

Golf fans on the course, and those watching from home, enjoyed another great Toshiba Classic which took place at the Newport Beach Country Club (NBCC). The Hoag Hospital Foundation thanks the NBCC owners, management and members for their ongoing support and partnership.

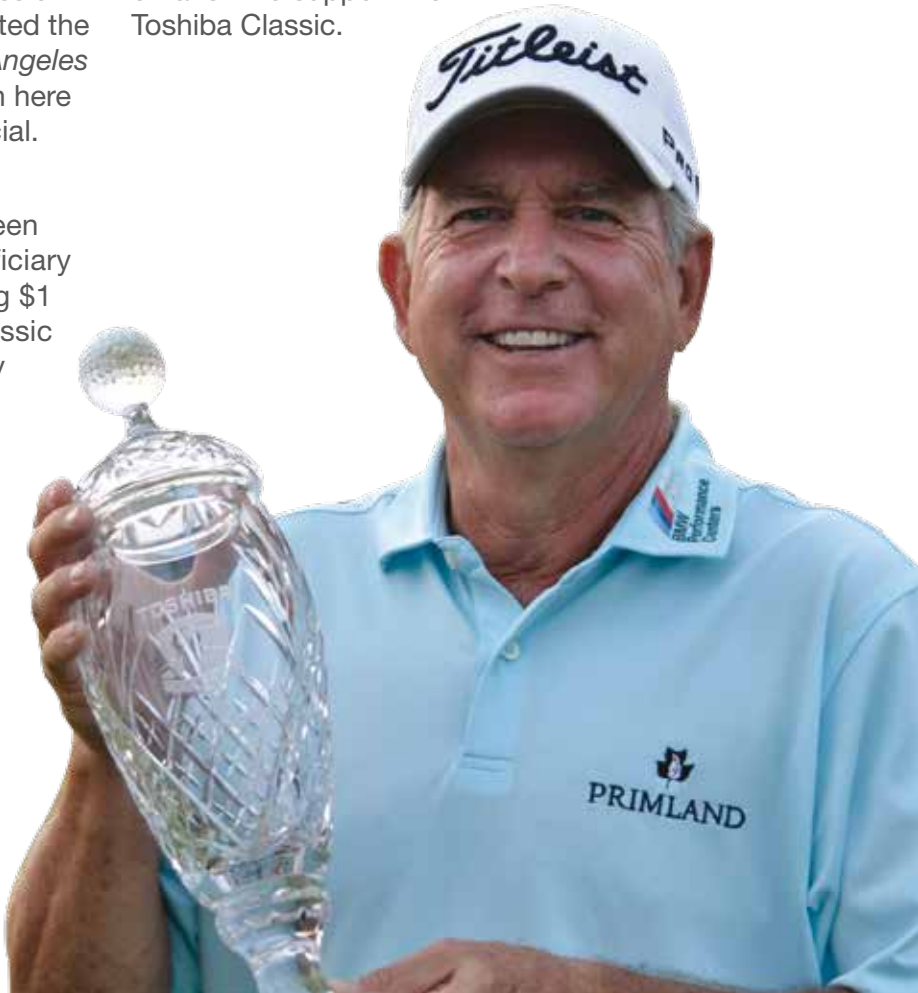
For the second time in his career (2007, 2016), Jay Haas was the winner of the Toshiba Classic. Haas, with the entire PGA and fans, celebrated the memory of Arnold Palmer. He told the *Los Angeles Times*, "To play well and to be the champion here the week that Arnold passed is awfully special. Hopefully, he's smiling."

2016 marks the 19th year that Hoag has been the event manager, host and primary beneficiary of this renowned event. Consistently raising \$1 million each year for Hoag, the Toshiba Classic has benefited health care in our community in ways that are incalculable. Since 2011, proceeds have benefited the Mary & Dick Allen Diabetes Center at Hoag.

On behalf of golf lovers, local businesses and Hoag patients and families in our community, we offer our heartfelt thanks to Toshiba America, Inc. which extended its

title sponsorship of the PGA Champions Tour event that bears its name for three more years. Mark your calendar for the return of the Toshiba Classic in March 2018.

We also express our deep appreciation to Kingston Technology and our other committed sponsors as well as more than 800 volunteers and thousands of fans who support the Toshiba Classic.





Tournament Week Highlights:

The 2016 Toshiba Classic inaugurated its first Student Day, inviting fans 18 and under to test their putting skills for free.



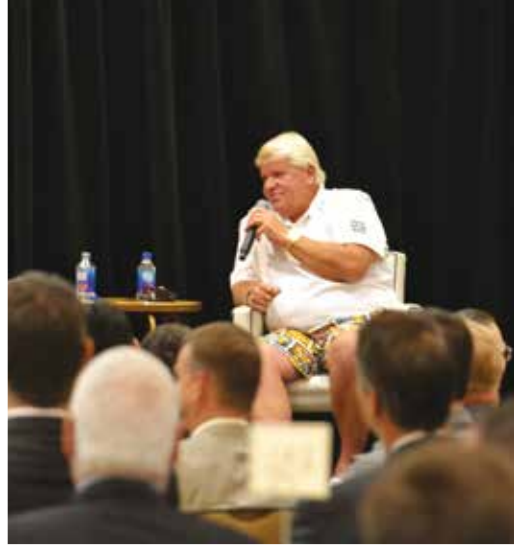
Two-time PGA TOUR Champion, John Daly was guest of honor at the annual Breakfast with a Champion, held at the Balboa Bay Resort and sponsored by Allergan.



Womanology 2016, a special event that welcomed 250 women, was produced in partnership with sponsors – Allergan, Cigna and RightSourcing.



The 2nd Annual Military Appreciation Day presented by Microsemi welcomed 3,000 military members and their families.



Hospital Founda



From left to right: Ginny Ueberroth, Dr. Allyson Brooks and Peter Ueberroth



ENDOWED CHAIR

11 and Counting!

Honoring Dr. Allyson Brooks and Donors Ginny and Peter Ueberroth

On the evening of October 18, Hoag Hospital Foundation had the pleasure of holding an endowed chair investiture ceremony and white coat processional to recognize the appointment of Allyson M. Brooks, M.D., chief quality officer at Hoag, as the Ginny Ueberroth Executive Medical Director Endowed Chair, Hoag Women's Health Institute. With colleagues, family, friends and philanthropists in attendance, the event honored the generosity and steadfast commitment of visionary donors, Ginny and Peter Ueberroth.

The gift from Ginny and Peter Ueberroth recognized and honored Dr. Brooks for her work in expanding health care options, education and access for women across Orange County. "I'm hoping that the impact of our gift will be that women have better health care," said Ginny Ueberroth, Hoag Hospital Board of Directors Member. "And that they will take better care of themselves and take advantage of what Hoag has to offer."

"The Ginny Ueberroth Executive Medical Director Endowed Chair brings the total number of chairs

at Hoag to 11, which is remarkable," said Flynn A. Andrizzi, Ph.D., president of the Hoag Hospital Foundation. "The generosity from donors in the community supports Hoag's innovative spirit."

Dr. Brooks plans to use the gift to recruit physicians with special expertise and passion for women's health.

"Allyson is an exceptional leader," said Robert T. Braithwaite, president and CEO of Hoag. "As we press forward for our women's institute, she has that ability to create a vision, to inspire people to follow that vision and help us move forward not just as a hospital, but as an entire community."

While historically associated with academic institutions, Hoag now has 11 endowed chairs which are enabling the organization to expand and improve programs in cancer, cardiac care, memory loss and cognitive impairment, neurosciences, cardiovascular surgery, gastrointestinal disease, diabetes, breast care and women's health services. Supporting Hoag's extraordinary leaders with endowed chairs is a key fundraising priority of Hoag Promise, Our Campaign to Lead, Innovate & Transform.



Visit www.HoagPromise.org and go to Campaign and then Campaign Toolkit for a complete list of Hoag's Endowed Chairs.

VOLUNTEER RECOGNITION

And the Award Goes to...

2016 Vin Jorgensen Award Winners

Each year, Hoag Hospital Foundation honors those whose volunteer service is outstanding and deserving of special recognition. Recipients are those who organize and lead programs; plan and conduct Foundation activities, benefits and special events; provide guidance and direction; set policy and procedure and encourage their friends to financially support Hoag.



Pei-yuan Chia and Katherine Shen

Hoag Hospital
Foundation Board

Internationally renowned business leader Pei-yuan Chia and his wife, Kitty Shen, have long been generous Hoag supporters.

The couple's funding of the annual Advances in Arrhythmia Management Symposium has helped place Jeffrey M. Carlton Heart & Vascular Institute (JCHVI) on the national stage. As venture philanthropists, Pei and Kitty are the sponsor donors of the innovative health care navigation and patient advocacy pilot program. Pei is a member of the Hoag Hospital Foundation Board where he serves as Chair of the Audit Committee and a member of the Investment Committee. He is also a member of the Hoag Promise Campaign Leadership Council. Kitty is tireless in her advocacy for Hoag. A member of the Hoag Irvine/Orthopedics Campaign Advisory Committee, Kitty has shared Hoag's vision with her wide network and connected many new friends to Hoag. She has spearheaded several initiatives which allow Hoag to tell its story to new audiences.



Beth Knapp
Circle 1000

Beth Knapp is passionate about cancer care and research, having devoted many years as a volunteer leader at Hoag. A past Chair of Circle 1000 Annual Founders'

Celebration Brunch, she has served on the Circle 1000 Founder's Committee for 15 years. She presently serves on the Hoag Family Cancer Institute Campaign Advisory Committee. "When a loved one receives a cancer diagnosis, it touches a nerve and it makes you want to give more to the physicians and nurses who help your family through that event," she said. "We are so fortunate to have the premier Hoag Family Cancer Institute right here in our community and that is due to the dedication of groups such as Circle 1000. The women I have worked alongside are incredible and they have created a place where people all over the nation come for exceptional cancer care. Our physicians change people's lives and I'm honored to support them in their work."



Catherine "Cathie" Hall
Hoag Hospital Auxiliary

A lot has changed at Hoag over the years. Catherine "Cathie" Hall would know, having been a dedicated volunteer since 1982. But one thing hasn't changed and that is the bright, helpful

spirit among volunteers, staff, physicians and nurses at Hoag. When she guides families and patients through Hoag Hospital Newport Beach, or transports a discharged patient, she hears them express gratitude for their care and for the way they were treated by everyone at Hoag. Every Thursday, Cathie is ready to perform her tasks with her characteristic can-do attitude. She also makes newborn caps for Hoag babies, delivering 640 a month. When asked why she has devoted 34 years of service to Hoag, she answers, "You can't play tennis every day!"



Otis Healy
Campaign Volunteer
Leader

Otis Healy's definition of a successful retirement is working hard for a cause that is meaningful. A long-time Hoag supporter, Otis has been a 552 Club donor

since 1987 and he is delighted to serve on the Hoag Irvine/Orthopedics Campaign Advisory Committee. He has also been an active member of the Hoag Family Cancer Institute Campaign Advisory Committee. As a colon cancer survivor, he is passionate about advancing cancer care and outcomes. To show his gratitude and enthusiasm for Hoag's alliance with Keck Medicine of USC's Norris Comprehensive Cancer Center, he made a significant gift to Hoag Family Cancer Institute at Hoag Health Center Irvine to support collaboration through joint tumor boards and other activities to benefit cancer patients. In recognition, Hoag named the Healy Family Conference Room at Hoag Health Center Irvine in his honor.



Trudi Bonnet
552 Club

"What we have done for ourselves alone dies with us; what we have done for others and the world remains and is immortal." These words by Albert Pike guide Trudi Bonnet. A cancer survivor

thanks to Hoag, Trudi has been a passionate 552 Club volunteer since 2007. Actively involved with the Hoag Summer Classic and Christmas Carol Ball, Trudi sells raffle tickets and recruits restaurant and retail partners to make donations and provide raffle prizes. An avid supporter of nursing education, Trudi has served on the *Choose Nursing, Choose Hoag* Committee since 2013. She loves meeting nurses at the annual Nurse's Day Luncheon and encouraging them to strive for their educational goals.

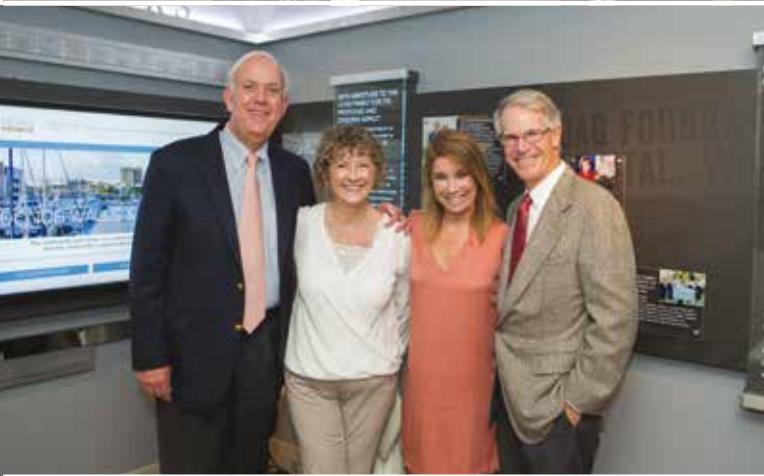


VIZIO
Corporate Partner

When Hoag Hospital Irvine opened in fall of 2010, VIZIO donated state-of-the-art HDTVs to fully equip Hoag's new campus. A leading U.S. HDTV and Sound Bar company headquartered in

Irvine, VIZIO stepped up once again to donate all of the HDTVs at the new Hoag Health Center Irvine. In addition, VIZIO has donated auction items for the Christmas Carol Ball and was a two-time sponsor of Hoag's Forum on Healthcare. VIZIO Founder and CEO William Wang explains that VIZIO employees share his sense of pride and personal gratification knowing that their work is benefitting their community through VIZIO's support of Hoag. William, a Hoag Hospital Foundation Benefactor, shares; "I'm grateful that millions of people buy VIZIO products. I feel it is my responsibility to make sure that the money I've earned is used well and carefully so that together, we can make a positive impact in the world. Hoag stands out by providing cutting-edge medical services for the local community. It is an absolute honor for VIZIO be able to help such a great cause!"

11-12



DONOR TRIBUTE

Hoag Hospital Foundation Unveils Gallery of Philanthropy

Beautiful, Interactive Tribute Recognizes Past and Present Philanthropic Partners

In June 2016, the Hoag Hospital Foundation gathered philanthropists, physicians and friends to officially unveil the new Gallery of Philanthropy. Prominently located in a main traffic corridor at Hoag Hospital Newport Beach, across from the William & Nancy Thompson Family & Visitor Surgery Waiting area and the Muzzy Gift Box, this new donor recognition area honors generous philanthropists from Hoag's past and present.

In her remarks, Kenya Beckmann, senior vice president of the Hoag Hospital Foundation, pointed out some of the key design features that define what philanthropy means at Hoag.

"The mirrored strips near the names along the wall were a very intentional feature of the Gallery of Philanthropy," she said. "No matter who you are – whether you're waiting for a family member in surgery, a staff member or a donor, you see yourself here as part of the Hoag community of philanthropists. My hope is that everyone will look around and feel the collective strength of all these individuals who made gifts because they believed in Hoag, in health care and in the promise of what Hoag can do for all of us."

Lin Auer, Benefactor and member of Hoag Family Cancer Institute and Hoag's Neurosciences Institute Campaign Advisory Committees, spoke about how she became involved at Hoag, initially as a member of the 552 Club.

"I witnessed the growth of Hoag from a small community hospital to become the outstanding organization it is today," she said. "All of us are ambassadors of Hoag. We reach out to our community. We engage friends and family and we try to explain and expand upon the services, programs and the excellence of care that we receive at Hoag."

The Gallery of Philanthropy is the thoughtful consolidation of all cumulative giving recognition into one grand location. Interactive monitors enable individuals to look up donor recognition listings, inspiring donor stories and information on Hoag Promise, Our Campaign to Lead, Innovate & Transform. Guests can learn about the many giving opportunities available through the Campaign.

**"I witnessed the growth
of Hoag from a small
community hospital to
become the outstanding
organization it is today."**

EVENTS

Summer Classic

Makes Us Feel Fine!

**Annual foodie and music event totals over
\$2,000,000 in funds raised for Hoag since 1998**

The 2016 Hoag Summer Classic, hosted by the Hoag Hospital Foundation and the 552 Club, was a sold-out event with more than 1,500 guests at The Newport Dunes Resort in Newport Beach. This highly anticipated summer favorite was held on Wednesday, June 29, 2016, raising \$190,000 for Hoag.

Frances and John Applegate, M.D., and Megan and Brad Schmitt were co-chairs for this year's event. "We thank our co-chairs and our many volunteers for their hard work in providing our guests with a wonderful experience," said Flynn A. Andrizzi, Ph.D., president of Hoag Hospital Foundation. "Thanks to our generous event underwriters as well as our restaurant partners, who donated all the food and beverages, the 2016 Hoag Summer Classic was an unprecedented success."



While hundreds of donors and friends of Hoag attend this event annually, for many, the Hoag Summer Classic serves as the introduction to Hoag. Everyone enjoyed the culinary masterpieces from 40 of Orange County's finest restaurants, including:

- A Restaurant
- Back Bay Bistro
- Bayside Restaurant
- Bluewater Grill
- The Bungalow
- Café Gratitude
- Caliente Southwest Grille
- club Detox
- Coastal Catering by Island Hotel
- DP Catering
- El Cholo
- Gabbi's Mexican Kitchen
- Greenleaf Gourmet Chopshop
- Harborside
- Hi-Time Wine Cellars
- Justin Vineyards and Winery
- Kéan Coffee
- Maddalena Vineyard Brands
- Maggiano's Little Italy
- Newport Firefighter's Association
- Newport Landing
- Newport Rib Company
- Nothing Bundt Cakes
- Old Vine Café
- Orange Coast Winery
- Pizza Nova
- Red O
- The Ritz Prime Seafood
- Royal Thai Cuisine
- Ruby's Diner
- Rusty Pelican
- Sabatino's Sausage Company
- Santa Monica Seafood
- Schroeder Family Wines
- Spa Girl Cocktails
- Straub Distributing
- Sweet Lady Jane
- Turnip Rose Catering
- Waffleholic Cafe
- Wine Gallery

The event held an impressive raffle thanks to the Hoag Summer Classic restaurant partners and underwriters and it also included a one-year lease of a new 2016 BMW 428i Gran Coupe, courtesy of Sterling BMW.



DONOR PROFILE

Celebrating Hoag Promise Physicians

In April 2016, Hoag Hospital Foundation hosted the 3rd Annual Physician Campaign Leadership Group (PCLG) Celebration Dinner at the Balboa Bay Resort. The awarding of the first Lifetime Achievement Physician Award to Douglas Zusman, M.D., Hoag chief of staff elect, was one of the evening's highlights. Hoag Hospital Foundation bestowed the award in recognition of Dr. Zusman's dedicated partnership in support of the Hoag Promise Campaign.

The program was led by PCLG Co-Chairs Michael Brant-Zawadzki, M.D., FACR, Ron & Sandi Simon Executive Medical Director Endowed Chair, Hoag Neurosciences Institute, Hoag senior physician executive; Allyson Brooks, M.D., Ginny Ueberroth



Executive Medical Director Endowed Chair, Hoag Women's Health Institute, chief quality officer, Hoag; and Kris V. Iyer, M.D., FACP, FACE, senior vice president, Hoag.

Flynn A. Andrizzi, Ph.D., president of the Hoag Hospital Foundation, led an insightful panel of next generation donors who shared what motivates

them to give and how philanthropy touches their hearts in meaningful ways. The panelists included Richard Frank; Beth Knapp, member of Hoag Family Cancer Institute Campaign Advisory Committee, member and past chair of Circle 1000; C.C. Knowles, member of the Women's Health Institute Campaign Advisory Committee; and Mike Muzzy, member of Hoag's Neurosciences Institute Campaign Advisory Committee.



From left to right: Dr. Kris V. Iyer, Dr. Allyson Brooks, Dr. Douglas Zusman and Dr. Michael Brant-Zawadzki

MESSAGE FROM THE PRESIDENT

Flynn A. Andrizzi, Ph.D.
President, Hoag Hospital Foundation



New Donors Join Long-Time Supporters as Hoag Expands

It is fitting that almost a year to the day of the public kickoff of the Hoag Promise Campaign, Hoag celebrated another major milestone—the grand opening of Hoag Health Center Irvine. Hoag’s continued expansion in Irvine is a bold move, pushing far beyond the vision of Hoag’s founders and original supporters. I like to think that they would be very proud of how Hoag has evolved into an extraordinary Orange County asset, serving more patients and families than they would have imagined back in 1952.

With the opening of Hoag Health Center Irvine, we have welcomed a new community of donors and friends who want to be part of this important legacy. Early philanthropic partners in Irvine,

who believe in Hoag’s model of outstanding care, have assisted us in providing Irvine families with a health care village in their own backyard.

At the same time we are celebrating this new health care asset in Irvine and the donors it is inspiring, we are grateful for our longstanding philanthropic partners. Our community was recently treated to the Toshiba Classic, a world-class PGA Champions Tour Event. Thanks to nearly two decades of philanthropy from the Toshiba Classic, Hoag patients and families have had access to the highest level of care, prevention and support.

For the past five years, nearly \$5 million in proceeds have benefitted

the Mary & Dick Allen Diabetes Center. When I talk to people who have been served by the physicians, nurses and programs through the Allen Diabetes Center, I feel a profound sense of appreciation for the namesake sponsor, Toshiba America, Inc. and our other committed sponsors such as Kingston Technology and many others.

Please join me in thanking our long-dedicated corporate partners as well as our new community of visionary donors. The impact of donor support of the Hoag Promise Campaign, while already profoundly felt, will shape health care delivery at Hoag for generations to come.

GIFT PLANNING

If Your Goal Is To:	Ask Us About:	And Consider This:
<ul style="list-style-type: none"> Keep control of your assets throughout your life Avoid estate taxation Leave a philanthropic legacy 	Bequest	You can create a bequest through your will or trust stating a specific amount or percent of your estate or by changing the beneficiary on a life insurance policy, annuity or retirement account.
<ul style="list-style-type: none"> Exchange low yielding assets for a fixed lifetime income that is partially tax exempt Generate a current income tax deduction 	Charitable Gift Annuity	Income can begin immediately or be deferred to a later date when payments received are larger.
<ul style="list-style-type: none"> Retain the right to live in your residence for life Use the equity in your home to generate additional retirement income 	Life Estate Agreement Plus Charitable Gift Annuity	If your situation changes, you can rent the property to others OR exchange your life estate for cash or annuity income.
<ul style="list-style-type: none"> Receive lifetime income with potential for growth Avoid capital gains tax at sale of appreciated asset: real estate, stocks and mutual funds Generate a current income tax deduction 	Charitable Remainder Unitrust	Year-to-year income varies with trust performance. Flexible design allows full income distributions immediately or minimum distributions at the start and increased cash flow at a future date.
<ul style="list-style-type: none"> Assure your philanthropic legacy lives forever Fund long-term programs, carrying family name and/or causes through the generations 	Endowment Gift	An endowment can be funded outright or by a multi-year pledge, bequest or designated remainder from either a trust (CRT) or annuity (CGA).
<ul style="list-style-type: none"> Transfer assets to children or grandchildren over time while heavily discounting gift or estate taxes Provide annual support to a charity for a term of years 	Charitable Lead Trust	This trust avoids “all the money at once” inheritance. Children/grandchildren receive lump sums deferred for specified terms (5 years, 10 years, etc.).
<ul style="list-style-type: none"> Have a predictable, fixed income not subject to market fluctuations Avoid capital gains tax at sale 	Charitable Remainder Annuity Trust	Fixed income for life or set term of years (5, 10, 15 or 20) for short-term needs such as early retirement (first 10 years until Social Security/ Pension starts) or college funding for heirs.
<ul style="list-style-type: none"> Gift a life insurance policy which is no longer needed Maximize the size of your testamentary charitable legacy 	Gift of Life Insurance	You can gift either a paid-up insurance policy or make annual gifts to Hoag to fund the ongoing premiums.
<ul style="list-style-type: none"> Avoid double taxation (income and estate tax) on your IRA balance at death Fund a charitable bequest 	Gift of IRA	Hoag can be a full or part beneficiary of your IRA account. Pending legislation may make lifetime transfers work.
<ul style="list-style-type: none"> Avoid capital gains tax on a sale of stock, mutual funds or real estate Generate tax deduction for full market value See your philanthropy at work 	Outright Gift of an Appreciated Asset	Asset must be held long term (one year plus one day).
<ul style="list-style-type: none"> Sell appreciated real estate for both cash and income Generate a tax deduction to offset initial gain on cash portion Defer taxation on balance using installment sale treatment 	Installment Bargain Sale	This technique may be the best for indebted real estate.

Hoag Hospital Foundation
2016 BOARD OF DIRECTORS

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Hoag Promise Campaign Update

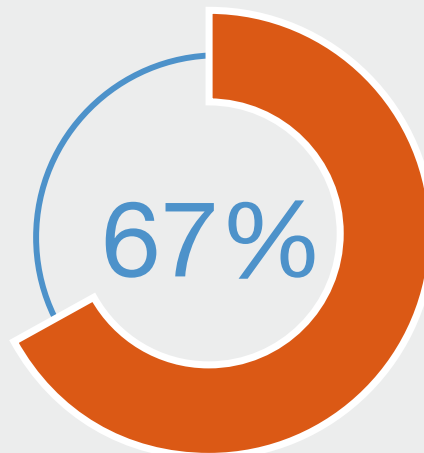
By supporting Hoag Promise, Our Campaign to Lead, Innovate & Transform, community members are collaborating with us to drive Hoag's continued clinical leadership, innovative spirit and transformative potential. For more information about Hoag Promise, visit www.HoagPromise.org.

Campaign Progress to Date

Campaign Duration: 2010 to 2020

\$421M

RAISED TO DATE



\$627M

2020 CAMPAIGN GOAL