

SCANNER

SPRING EDITION

2017

Nifty Fifty!

Golden Anniversary of the Christmas Carol Ball



Vintage photo (L to R): 1966 Voices of Christmas Ball entertainers, Les Brown, Al Auer, Ben Dean, John Wayne, Harry Babbitt, Marshall Duffield and Sonny Burke at the piano

Inset Photo (L to R): The next generation singing around the piano at the 2016 Christmas Carol Ball, Ethan Wayne, son of John Wayne, Al Auer's daughter, Allison Kearns and Marshall Duffield's son, Duffy Duffield



hoag | **HOAG**
Hospital Foundation **PROMISE**

IN THIS ISSUE

04 Hoag Hospital Irvine - Donors Are Stepping Up to Help Expand a Vital Community Resource

07 Road to Recovery - Gary Fudge Is Helping Hoag Add Needed Rehabilitation Services

09 Wonder Women - Meet Hoag's Women's Health Institute Campaign Advisory Committee

LETTER FROM THE CHAIR

Dear Friends of Hoag:

It was a night fifty years in the making and it was one to remember.

For those of us who attended the 50th Annual Christmas Carol Ball, we had the sense that we were part of something greater than ourselves. We joined in a tradition established by a small but committed group of philanthropists who, like us, believed in the importance of local access to excellent health care.

Through the generosity of our community, the 50th Annual Christmas Carol Ball raised nearly \$1.5 million to support Hoag and the talented, passionate clinicians who not only keep us healthy, but who are there in our times of need. To our underwriters, guests and my dedicated co-chair, Karen Linden, I extend my deepest gratitude and appreciation.

In this issue of *Scanner*, we explore the next evolution of Hoag Irvine with the progress of the new Hoag Hospital Irvine Emergency Department. The growth of Hoag Irvine is nothing short of phenomenal and it is a privilege to see it happening right before our very eyes. Among the many things I love about Hoag is the dedication to education. The Allan & Sandy Fainbarg Community Education Center has provided a beautiful, technically-advanced space for the community, physicians, nurses, technicians and staff to share information and best practices on a number of topics. We are so fortunate to have this space.

We highlight the generosity of Gary Fudge, whose recent gift will name the Fudge Family Acute Rehabilitation Center. And, we are excited to celebrate the Women's Health Institute Campaign Advisory Committee, chaired by long-time 552 Club volunteer leader (and former Christmas Carol Ball chair), Terry Callahan. These women are our "boots on the ground" and are opening their homes to share information about Hoag services and programs with their families, friends, neighbors and colleagues.

In my position as Chair of the Hoag Hospital Foundation Board of Directors, it is my profound honor to work alongside my Board colleagues, fellow volunteers and philanthropists who are helping bring the vision of the Hoag Promise Campaign to fruition. I'm deeply grateful to our community of generous donors who are partnering with us to meet our goals today and move Hoag beyond what any of us can imagine in the next 50 years.

Sincerely,



Cindy Stokke
Chair, Hoag Hospital Foundation Board



CONTENTS



01

COVER STORY

01 | Nifty Fifty
Golden Anniversary of the
Christmas Carol Ball



04

HOAG IRVINE

04 | Honoring the
Generosity of the
Fainburg Family
05 | Hoag Irvine
Emergency
Department



07

DONOR IMPACT

07 | Road to Recovery



09

VOLUNTEER RECOGNITION

09 | Wonder Women



10

HOAG PROMISE CAMPAIGN UPDATE

10 | Hoag's Women's
Health Institute



11

EVENTS

- 11 | *Choose Nursing,
Choose Hoag*
Luncheon
- 13 | Heritage Society
Luncheon



15

HOAG HOSPITAL FOUNDATION

- 15 | A Legendary Life
- 16 | Gift Planning
- 17 | Message from
the President

Scanner Magazine

Published by Hoag Hospital Foundation

Editor: Deb Dominguez
Executive Director, Communications

Coufos Family Center for Philanthropy

330 Placentia Avenue, Suite 100
Newport Beach, CA 92663

Scanner designed by creativeshoebox.com

If you would like to be removed from the
Scanner mailing list, please contact us
at the address above or call (949) 764-7217.

Nifty Fifty!

Golden Anniversary of the Christmas Carol Ball

What we know as the Christmas Carol Ball started in 1966 with the Voices of Christmas Ball, an event featuring dozens of A-list Hollywood types who would gather at the Balboa Bay Club to sing Christmas carols and read poetry. That star-studded event featured special performances by Hoag's celebrity supporters. Big-band-era crooner Harry Babbitt sang, actor Buddy Ebsen tap-danced, actor Andy Devine read "Twas the Night Before Christmas" and the inimitable John Wayne recited a poem.

The Voices of Christmas Ball evolved into the Christmas Carol Ball in the 1970s after Hoag leaders realized it had tremendous community interest and support. Today, the Christmas Carol Ball is a cherished part of Hoag history that remains a relevant and important fundraising event for Hoag.

Tradition of Generosity

Fifty years later, on December 10, more than 640 Hoag supporters, volunteers and friends gathered at the Monarch Beach Resort and collectively raised just under \$1.5 million for Hoag.

The crowd was treated to a surprise sing-along by the descendants of the original Ball celebrants. Ethan Wayne, son of John Wayne, was joined on stage by Al Auer's daughter, Allison Kearns and Marshall Duffield's son, Duffy Duffield for a re-creation of the iconic photo of their fathers singing around the piano (see cover photos).

Nora Jorgensen Johnson returned to deliver her 49th invocation and to lead the crowd in singing "Jingle Bells." Dear friends of Hoag, Dr. John and Frances Applegate, who escorted Nora on stage, hold the record for 50 years of perfect attendance!

Karen Linden and Cindy Stokke served as co-Chairs for the 50th Annual Christmas Carol Ball. During their remarks, Karen and Cindy shared that they were honored to serve as the 2016 Chairs for the golden anniversary of this important philanthropic tradition.



Christmas Carol Ball co-Chairs, Karen Linden and Cindy Stokke

A look back...



03-04

2016 Christmas Carol Ball



Please visit the Hoag Hospital Foundation Facebook page to see more vintage photos from the Christmas Carol Ball as well as photos from the 2016 event.

[Facebook.com/hoaghospitalfoundation](https://www.facebook.com/hoaghospitalfoundation)

HOAG IRVINE



L to R: Ryan Chase, Irv Chase, Steven Fainburg, Sandy Fainburg, Nancy Chase, Catie Chase, Brooke Chase and Florence Fainburg

Honoring the Generosity of the Fainburg Family

The Hoag Hospital Foundation announced the naming of the Allan & Sandy Fainburg Community Education Center at Hoag Hospital Irvine. Hoag named the Fainburg Community Education Center in recognition of the Fainburg family's ongoing generosity and their latest gift benefiting multiple areas of Hoag, including:

- Hoag Hospital Irvine Emergency Department expansion
- Endowed Education Fund in honor of James Berman, M.D.
- Clinical Fellows in Total Joints, Spine and Sports Medicine
- Hoag Orthopedics Grand Rounds and Community Outreach

Steven Fainburg cut the ribbon alongside Marcy Brown, vice president of Hoag Hospital Irvine and Ambulatory Services and Carlos Prietto, M.D., M.Ed., president of Hoag Orthopedic Institute and executive director of Hoag Orthopedics.

Vital and Active Community Resource

Last year, the Fainburg Community Education Center was host to 168 patient and community education

classes and workshops, 88 physician grand rounds and 86 Hoag employee training sessions. "We are pleased to recognize the Fainburg family's most recent gift to Hoag with the naming of this facility," said Robert Braithwaite, Hoag president and CEO. "The Fainburg Community Education Center is the site of health screenings, outreach programs and wellness classes as well as health education programs for medical providers, staff and the community."

The Fainburg family's past giving allowed Hoag to be one of the first with ground-breaking technology in the Allan & Sandy Fainburg Electrophysiology Catheterization Suite, housed in the Jeffrey M. Carlton Heart & Vascular Institute at Hoag Hospital Newport Beach.

"We are privileged to count the Fainburg family as long-time Hoag supporters whose generosity is having a direct impact on outstanding care in our community," said Flynn A. Andrizzi, Ph.D., president of the Hoag Hospital Foundation. "It's wonderful to honor and celebrate the culture of philanthropy that Allan and Sandy have instilled in their family."

HOAG IRVINE

Hoag Hospital Irvine Emergency Department

Donors Are Stepping Up to Help Expand a Vital Community Resource

The Hoag Hospital Irvine Emergency Department (ED) is the hospital's front door for those in dire need. In the years since its 2010 opening, the capacity of the Hoag Hospital Irvine ED has been outpaced by the growing Irvine population. Daily visits have increased from 50 to up to 120 patients and volume is on the rise. It has never been more important to expand this resource that's central to the health and well-being of an entire community.



L to R: Marcy Brown, Chris Callero, Missy Pace Callero, Kai Liang, Daphne Liang and Hoag Hospital Foundation President, Flynn A. Andrizzi, Ph.D.

Coming Through for Irvine

Donor support for the ED expansion underscores just how much this project means to Irvine residents. Ground-floor donors are making significant gifts to ensure that the Hoag Hospital Irvine ED is able to deliver a quality experience for patients and their families.

“My husband Chris and I are intentional about supporting our local community and our goal this year was to benefit community health,” says Missy Pace Callero, co-founder of the Callero Family Foundation. “We want our gift to serve as many people as possible and we knew a gift supporting the Hoag Hospital Irvine ED would touch a lot of people in a positive way during a stressful time.”

We extend our deepest appreciation to these early supporters:

- Hoag is naming the **Callero Family Foundation Atrium** in recognition of a gift from The Callero Family Foundation
- Hoag is naming the **Horowitz Family Lounge** in recognition of a gift from the Horowitz Family
- Hoag is naming the **Daphne & Kai Liang High Acuity Treatment Room** in recognition of a gift from Daphne and Kai Liang



Creating an Efficient ED with a Calming and Healing Environment

Visionary donors are helping Hoag update and transform the Hoag Hospital Irvine ED to better serve patients with the latest in advanced care. Improvements include:

Expanded Treatment Space

- 38 private treatment spaces; nearly triple the 14 we have today
- 32 private family consultation rooms
- Dedicated OB/GYN, Cardiac and Stroke receiving rooms
- Dedicated isolation rooms

Efficient Processes to Reduce Wait Times

- Treating minor injuries in fast track bays
- Improved patient registration, charting, data collection and tools for team coordination
- Collaborative care in partnership with the Lab, Pharmacy and Radiology
- Increased telemedicine through robotics for CHOC-pediatrics, stroke and other complex patient conditions

The first phase, which includes adding 24 new patient rooms, has begun. The second phase featuring a new patient lobby will begin fall 2017. The ED will remain open throughout the renovation which is scheduled for completion in early 2019.

“I’m so grateful to the Calleros and other generous families who are supporting the ED expansion,” says Marcy Brown, vice president, Hoag Hospital Irvine and Ambulatory Services. “Everyone who comes in our doors will benefit from their heartfelt and visionary philanthropy.” Marcy adds that with continued community support, our physicians, nurses and clinical caregivers will be able to provide the best care to those in need.

For more information about how you can support Hoag Hospital Irvine Emergency Department expansion, please contact C.C. Hafner at (949) 517-3178 or CC.Hafner@hoag.org.



“Our partnerships with visionary philanthropists like Gary are what allow us to provide important new services to our community. Soon, Hoag’s rehabilitation patients will no longer be left to recover in facilities that may not measure up. Hoag will see them all the way home and back to their lives.”

Joining donor Gary Fudge (4th from left) in celebrating the construction kick-off of the Fudge Family Acute Rehabilitation Center are Hoag leaders. **From Left to Right:** Flynn A. Andrizzi, Ph.D., Michael Ricks, Sanford L. Smith, AIA, Michael Brant-Zawadzki, M.D. and Robert T. Braithwaite.

DONOR IMPACT

Road to Recovery

A \$4 Million Gift from Gary Fudge Is Helping Hoag Add Much Needed Rehabilitation Services for Stroke and Brain Injury Patients

Where you receive stroke care matters. In fact, successful recovery from stroke is directly linked to best-in-class diagnosis and treatment. Fortunately for our community, Hoag's inpatient stroke program ranks in the top five percent in the nation. However, inpatient acute stroke care is only the beginning. Once the danger has passed, patients face a long rehabilitation and recovery process.

Perhaps no one knows that better than Hoag Promise Campaign volunteer and generous donor, Gary Fudge. After Gary's treatment at Hoag for a hemorrhagic stroke in November 2010, his son and daughter researched local rehabilitation facilities to determine the best option. Frustrated by limited choices that failed to meet the standards the family was accustomed to at Hoag, they reluctantly opted for home care.

Filling a Gap

Until now, Hoag stroke patients have had to leave Hoag for post-acute stroke rehab. The same is true for those with brain injuries and other conditions that require long-term rehabilitation. Thanks to donor support, Hoag is changing that. With the help of significant support from a fully recovered Gary, Hoag is starting construction of the Fudge Family Acute Rehabilitation Center.

"I remember when I first heard about this project at a Hoag Promise Campaign Committee meeting," muses Gary. "The longer I listened, the more I realized that this would be a greatly transformational program for our community. Everything patients need will be right here in the very pleasant and comfortable Hoag setting that they trust."

Good Business

The community's need for post-acute care rehabilitation services is growing. Last year, Hoag

discharged over 400 patients to outlying acute rehabilitation centers. Hoag is locating the Fudge Family Acute Rehabilitation Center in unused clinical space on the third floor in the north tower of Hoag Hospital Newport Beach.

Repurposing unused space also appealed to Gary. "Being a business person," shares Gary, "I like the idea that we are taking what had been unproductive space at the hospital and finding a wonderful use for it to serve the community."

Care Across the Continuum

When complete in mid-2018, the new Fudge Family Acute Rehabilitation Center will feature residential post-acute care for patients after acute stroke, brain tumor surgery, intracranial bleeds, spine surgery, head trauma and other eligible conditions. It will provide neurological, orthopedic and traumatic brain injury patients with a streamlined and comprehensive continuum of care.

"We are very grateful to Gary Fudge for his inspired philanthropy that will have a direct and positive impact on so many," says Michael Brant-Zawadzki, MD, FACR, Ron & Sandi Simon Executive Medical Director Endowed Chair, Hoag's Neurosciences Institute and senior physician executive, Hoag.

For more information on how you can support acute rehabilitation care for patients at Hoag or other important Neurosciences Institute programs, please contact Stacy Sanchez-Hunt at (949) 764-7210 or Stacy.Hunt@hoag.org.

VOLUNTEER RECOGNITION

Wonder Women

Meet Hoag's Women's Health Institute Campaign Advisory Committee

The members of Hoag's Women's Health Institute Campaign Advisory Committee are doing their part to make sure women in our community are aware of the programs and services available in their own backyard—and how to support them.

"It is so important that we share and educate our friends, sisters and neighbors about how blessed we are to have Hoag's Women's Health Institute," says Terry Callahan, Women's Health Institute Campaign Advisory Committee chair. "I was touched when I heard Ginny Ueberroth say that when the mother in the family becomes sick, the whole family is affected. I experienced that in my own life and I wholly support Hoag's focus on keeping women in all life stages healthy in body, mind and spirit."

Committee members are connecting the community with Hoag's Women's Health Institute and the Hoag Promise Campaign. They generously open their homes to host salons and invite neighbors, friends

and colleagues to learn about Hoag's spectrum of care that spans from yoga and meditation to high-precision robotic surgery, pelvic floor health and breast care.

"We are deeply grateful to this phenomenal group of women for their generosity and support," says Allyson M. Brooks, M.D., Ginny Ueberroth Executive Medical Director Endowed Chair at Hoag's Women's Health Institute and chief quality officer, Hoag. "I am touched by their compassion for each other and for the women in our community. They are committed to raising awareness and funds for Hoag to give women access to innovative models of self-care, prevention and, when needed, world-class health care."

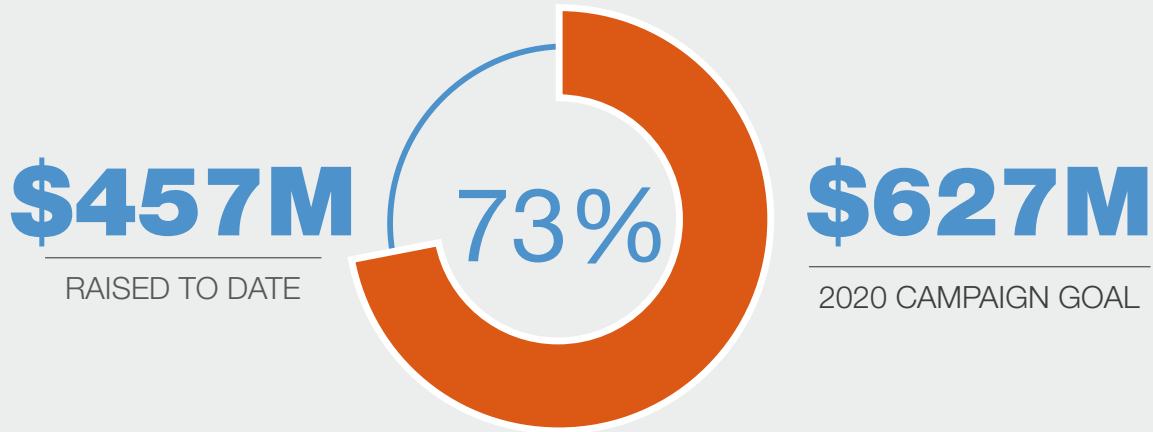
For more information on how you can support the innovative work of Hoag's Women's Health Institute, contact Carlin Kuhlmann at (949) 764-7209 or Carlin.Kuhlmann@hoag.org.



Women's Health Institute Campaign Advisory Committee members (L to R): Dr. Allyson Brooks, Sherri Bovino, Cindy Stokke, Patty Goethals, Trish Berchtold, Pam Massey, Kelly Lam, Terry Callahan, Patti Estabrooks, Dori Holnagel, Leslie Boyd, Carley O'Neill and Karen Linden (Not Shown: Alisha Ballard, Eve Blackwood, Kathie Buchanan, Pam Emery, C.C. Knowles, Christy Marr, Heather McGrath, Janae Muzzy, Pam Muzzy and Ginny Ueberroth)

HOAG PROMISE

Campaign Progress



Campaign Duration: 2010 to 2020

Featured Giving Opportunity:

WOMEN'S HEALTH INSTITUTE

Women's Mental Health Program: \$10,000+

With the help of philanthropy, Hoag is clearing away the obstacles to mental health services for women with two important gifts.

An anonymous \$10,000 gift supported the first six months of the newly developed Maternal Mental Health Support Line at Hoag.

Angela Mains, L.C.S.W. is the mental health navigator for the Maternal Mental Health Support Line. So far, she has visited nearly 20 obstetricians in their offices to teach them about proper screening for depression, steps to follow and ways to link their patients to various mental health resources. Through the Maternal Health Support Line, Angela has helped 22 women with illnesses such as depression, bipolar disorder, anxiety and addiction during pregnancy or post-partum connect to mental health providers.

Thanks to Women's Health Institute Campaign Advisory Committee members, Alisha Ballard and Heather McGrath, who made a \$500,000 gift through The Legacy Foundation to establish the Women's Mental Health Innovation Fund. These funds will help roll out the first and second phase of a comprehensive program under the directorship of Patricia De Marco Centeno, M.D., psychiatry consultation-liaison director and women's mental health adviser at Hoag.

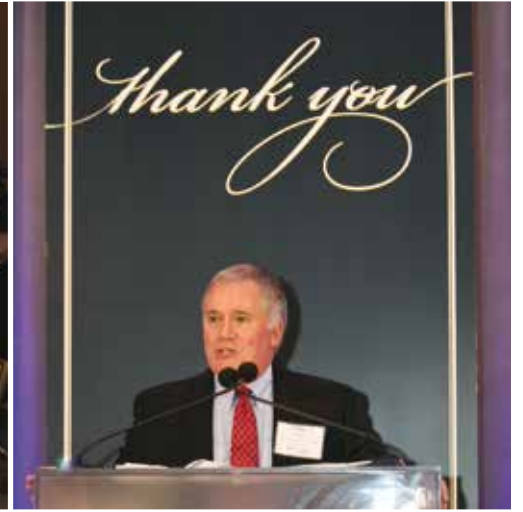
These first two phases focus on pregnant and post-partum women in our community with the following:

- A brief individual psychotherapy series (5-6 sessions) for eligible patients with depression during pregnancy or during the post-partum period to help jump start recovery and return to optimal health. If the patient is uninsured, Hoag will offer the sessions at a low-cost sliding scale rate
- Patient access to low-cost group psychotherapy classes
- Assistance with connecting to psychiatrists, long-term psychotherapy, dieticians, home-visitation programs, intensive outpatient programs and addiction services

"We are committed to empowering women who find themselves in a very vulnerable place," says Dr. De Marco. "We want women to know there is a safe place where they can find answers and strategies to get them through this time in their lives. With the help of philanthropy, we are making a difference in the lives of these women."

For more information on how you can support women's mental health care services at Hoag, please contact Carlin Kuhlmann at (949) 764-7209 or Carlin.Kuhlmann@hoag.org.

11-12



EVENTS



Choose Nursing, Choose Hoag

2016 LUNCHEON

Celebrating Hoag Nurses and the Donors Who Support Them

On November 9, 2016, nearly 200 donors, nurses and physicians, along with academic and corporate partners, gathered at the annual *Choose Nursing, Choose Hoag* luncheon to recognize and celebrate Hoag nurses and the donors who support them.

This year, Hoag moved closer to its goal of 80 percent of nurses with advanced degrees to meet the federal mandate by the Institute of Medicine (IOM) that will require that ratio by 2020 to maintain Magnet Status.

“Last year, 48 percent of Hoag nurses obtained a Bachelor of Science in Nursing or higher,” said Rick Martin, Ed.D., M.S.N., R.N., senior vice president of Clinical Operations and chief nursing officer at Hoag. “Thanks to your generous support, more than 450 Hoag nurses seeking advanced degrees pushed us up to 61 percent, a 25% increase in the last two years.”

Flynn A. Andrizzi, Ph.D., president, Hoag Hospital Foundation, credited these accomplishments to donors who joined with Julia and George Argyros and the Crean Family Foundation to not only increase the number of scholarships awarded, but also to triple the amount of each award.

“To give you some context, from 2007 to 2012, Hoag granted 216 donor-supported scholarships of \$2,000 per person, per year,” said Flynn. “From 2013 through fiscal year 2016, which ended on June 30, Hoag has given more than 1,600 donor-

funded scholarships and bumped up the award to \$6,000 per person, per year.”

The Argyroses were represented at the annual luncheon by Wendy Hales and her colleagues from the Argyros Family Foundation.

2016 *Choose Nursing, Choose Hoag* Donor Hall of Fame

Jim Newkirk, who was inducted into the *Choose Nursing, Choose Hoag* Donor Hall of Fame in 2015, got the opportunity to introduce his good friend and the former Chair of *Choose Nursing, Choose Hoag*, Jim Coufos, as this year’s Hall of Fame honoree.

He thanked his wife Viki for her support and council and commended Doug Meece, current chair of the *Choose Nursing, Choose Hoag* committee as well as Rick Martin for their leadership and friendship.

“In this room are the true Hall of Famers,” he said, encouraging Hoag nurses in attendance to stand and be recognized. “This has been a great honor. Thank you.”

For more information on how you can support nursing excellence at Hoag, please contact Angelina Morano at (949) 764-7221 or Angelina.Morano@hoag.org.



EVENTS

HOAG HERITAGE SOCIETY LUNCHEON

The Hoag Hospital Foundation honored a group of more than 200 philanthropists at its 23rd annual Hoag Heritage Society Luncheon on March 8 at the Balboa Bay Resort in Newport Beach. The Hawaiian-themed event, complete with an authentic live Hawaiian band, featured a menu of Huli Huli chicken and pineapple upside-down cake.

The highlight of the program was an interesting and heart-felt talk by donor Mike Gray, who along with his wife Lori, made a significant estate gift to Hoag. Thanks to their generosity, Hoag honored them with naming Hoag Health Center Newport Beach the Mike & Lori Gray Campus.

During his remarks, Mike discussed his mother, who suffered from alcoholism, and the impact that made on his life. He did a demonstration using a tape measure to illustrate a lifeline and invited the audience to be intentional about spending their remaining time.

“Lori and I thought about what we could do in the next part of our lives to give back to our community,” shared Mike. “The doctors at Hoag are not only interested in treating addiction, but they are also interested in education, which was something very important to us.”

He encouraged the audience to go out and speak with their family and friends, especially young people, to think about what they can do now to support their community. “I hope they will experience the harmony and contentment Lori and I are enjoying by giving a gift to the community,” he said. “It has created a bond between us that is priceless.”

Planned Gifts Make a Big Impact

At the luncheon, Hoag Hospital Foundation President Flynn A. Andrizzi, Ph.D. acknowledged planned giving donors Margaret Richardson and Dick and Sandy Waitneight. Mrs. Richardson (who has funded several charitable gift annuities) made recent gifts in support of Parkinson’s research and the Mary & Dick Allen Diabetes Center. Mr. and Mrs. Waitneight, close friends of Mary and Dick Allen, also chose to support the Allen Diabetes Center.

“Planned gifts account for a significant portion of the progress we’ve made toward our Hoag Promise Campaign goal,” said Flynn. “People are often surprised at the unique opportunities available to create income and minimize taxes through various gifting vehicles. We hope more individuals in our community will consider planned gifts to enjoy the benefits they can receive while also supporting Hoag.”

The Hoag Heritage Society is an extraordinary group of loyal donors who positively impact current and future generations by providing a gift to Hoag in their estate plans. For more information about gift planning, please contact Julie Heggeness, JD, CSPG at (949) 764-7206 or Julie.Heggeness@hoag.org.



Mahalo



DONOR PROFILE

A Legendary Life

JoAnn Kenton has quite a few colorful stories to tell and she's not done making a few more along the way. She was born in Los Angeles and, as a young child, her family spent many weekends playing in the Newport Beach sand.

Growing up, JoAnn had big dreams, one of which was to be a singer. That dream became a reality when she began singing up, down and across the country. She dazzled audiences with songs by her favorite entertainer, Peggy Lee, including "Fever" and "Why Don't You Do Right?" She shook hands with Ronald Reagan, dated Frank Sinatra and met Burt Bacharach.

"In 1965, I sang at The Newporter with the Freddy Martin Band and I asked if we could perform a new song called 'The Girl from Ipanema,'" she recalls. "Freddy said sure, make up the charts and we'll do it. The night we performed it, he introduced it as 'The Girl from Pasadena!'"

JoAnn continued her singing career until she married the renowned big band leader and jazz legend, Stan Kenton. When their marriage ended, she decided to study for her real estate license. In 1972, JoAnn began the longest and most satisfying chapter in her life when she settled down in Newport Beach and became one of the most successful realtors in the area.

"Back then, Newport Beach was still a place you visited on the weekend," she said. But things were changing. She saw the real estate market heat up to a steady simmer and then explode into a multi-billion-dollar market.

Newport Beach was where JoAnn's heart felt at home and where she became involved in the community and with Hoag. She was a member of the Hoag Auxiliary for seven years and spent most of her time volunteering in the surgery waiting room, coordinating patients and families.

I Love Being Here With You

After many of her close friends were successfully treated at Hoag, JoAnn decided to make a gift to give back to Hoag. As someone who greatly values integrity, service and community, she feels that Hoag's culture exemplifies those traits.

After researching her options, JoAnn contacted Julie Heggeness, executive director of gift planning at Hoag Hospital Foundation, and was pleased with how quickly and efficiently her wishes were handled. She was even more touched by the thoughtfulness and generosity of Julie and her assistant, Joni Ukegawa, Hoag Hospital Foundation's gift planning coordinator.

"When I was convalescing, Julie and Joni would walk over to visit me every day," she says. "It was such a joy to see them. I don't have close family, but I consider people like them my real family."



If you would like more information about making a planned gift, please contact Julie Heggeness at (949) 764-7206 or Julie.Heggeness@hoag.org.

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.

MESSAGE FROM THE PRESIDENT

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



Together We Are Making an Impact

As I reflect on what we've accomplished in the two years since the public launch of the Hoag Promise Campaign, I'm amazed at how far we've come thanks to the generosity and passion of our donor community. Hoag is thriving in no small part because committed individuals and families have the foresight to partner with us to bring the best in health care to our community.

Our philanthropic partnership with our Hoag family of donors is providing our patients with access to advances in technology before many others in Orange County, in California and, sometimes, in the nation. For example, Hoag was the first to employ robotic assisted surgery in Southern California and is recognized as a Center of Excellence in Robotic Surgery. All four of Hoag's da Vinci Surgical System® robots were funded by philanthropy.

Philanthropy has also supported Hoag's expansion from the Newport

Beach campus to the Hoag Irvine campus. Last summer, we brought the specialized care provided by Hoag's institutes to the Irvine community through the opening of Hoag Health Center Irvine - Sand Canyon. There are now ten Hoag Urgent Care and seven Hoag Health Center locations throughout the county. Hoag's newest Health Care Center is opening in Tustin next year, further extending the reach of Hoag services throughout Orange County.

Our 11 Endowed Chairs empower our physician leaders to engage in research in cancer, women's health, orthopedics, heart and vascular and neurosciences that puts Hoag among some of the most prominent medical centers in the nation. Endowed chair funds help Hoag recruit and retain exceptionally talented clinicians and launch innovative services and programs. More importantly, they help us improve and save the lives of patients who come to us in their time of need.

Our donors make an extraordinary impact on Hoag and many, like Gary Fudge, transform frightening medical events into life-affirming gifts. We are recognizing Gary's most recent act of generosity by naming the Fudge Family Acute Rehabilitation Center, which you can read about on page 7. I know stroke patients and their families will be forever grateful to receive a seamless continuum of care at the hospital they know and trust.

While we have accomplished a great deal together, we must not rest on our laurels. As we move closer to our Campaign goal of \$627 million in 2020, I imagine the people whose lives will continue to be touched by your generosity. Through Hoag Promise, Our Campaign to Lead, Innovate & Transform, we are ensuring a future in which Hoag will continue to lead the way in providing advanced care right here in our community.

Hoag Hospital Foundation
2017 BOARD OF DIRECTORS

Directors

Anthony A. Allen
Victor Assad
Patricia L. Berchtold
Robert T. Braithwaite
James O. Buckingham
Pei-yuan Chia
Lauri Delson
Benjamin R. Du

Stephen T. Fry
Jeremy M. Jones
Margaret Larkin
Karen D. Linden
Joseph C. Obegi
Robert S. Roth
Sandra L. Simon
James D. Slavik
Carol Sudbeck

Officers

Cynthia Stokke, Chair
Robert S. Brunswick, Vice Chair
Andrew A. Fimiano, Treasurer
Kathleen M. Armstrong, Secretary
Roger T. Kirwan, Immediate Past Chair
Flynn A. Andrizzi, Ph.D., President

Ex-Officio

Mark A. Hardtke, 552 Club President

HOAG HOSPITAL FOUNDATION
SENIOR LEADERSHIP

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

Kenya Beckmann
Senior Vice President, Hoag Hospital Foundation

Deb McCune
Vice President, Strategic Engagement

Greg Gissendanner
Assistant Vice President, Development

Christy Ward
Assistant Vice President, Major Gifts

HOAG PROMISE CAMPAIGN
LEADERSHIP COUNCIL

Dick Allen
Terry Callahan
Pei-yuan Chia
Jim Coufos
David Horowitz
Roger Kirwan
Karen Linden
Ginny Ueberroth

552 CLUB 2017 BOARD OF DIRECTORS

Directors

Jeffrey Brandt, M.D.
Terry Callahan
Curtis H. Ellmore
Lisa J. Hale
Noel D. Hamilton
Robert W. Josten
Cindy Kansky

Lisa M. Karamardian, M.D.
Arlene C. Key
Elaine King, M.D.
Chris Rabbitt
Bradley Schmitt
Tyler F. Terry
David A. Wright

Officers

Mark A. Hardtke, President
Terri Turner, Vice President
Gina Cereda, Secretary

A Hoag Hospital Foundation Publication

SCANNER

Non-Profit
Organization
U.S. Postage
PAID
Permit # 199
Newport Beach, CA



Coufos Family Center for Philanthropy
330 Placentia Avenue, Suite 100
Newport Beach, CA 92663
RETURN SERVICE REQUESTED



HOAG SUMMER CLASSIC

A MIDSUMMER NIGHT'S DREAM

Wednesday, June 28, 2017
5:00 p.m.

Newport Dunes
1131 Back Bay Drive
Newport Beach

Tastings from more than 30 of
Orange County's finest restaurants.

Live Entertainment presented
by Lido Live

Identification of guests for alcohol
consumption is required at event entrance.

For more information and to
purchase tickets, visit
HoagPromise.org/hoagsummerclassic



**HOAG
PROMISE**

