

A Hoag Hospital Foundation Publication

SCANNER

SPRING EDITION

2021

LEAD
INNOVATE
TRANSFORM

HOAG
PROMISE

Hoag Promise Campaign far surpasses goal of

\$627,000,000

IN THIS ISSUE

03 Hoag Promise Campaign Exceeds All Expectations

11 Fudge Family Birthing Suites Open at Hoag Hospital Irvine

19 Facing COVID-19 Head On

CONTENTS



03

COVER STORY

03 | Hoag Promise Campaign Exceeds All Expectations

07

A LEGACY OF GIVING

07 | Julia & George Argyros Give Additional \$7.5 Million Gift in Support of Nursing Excellence

09

DONOR FEATURE

09 | Family Experiences Inspire Latest Gifts from Sue J. Gross

11

GRAND OPENING

11 | Fudge Family Birthing Suites Open at Hoag Hospital Irvine



13

NEW TECHNOLOGY

13 | Hoag Family Cancer Institute Is First and Only in Orange County to Offer Groundbreaking Radiation Technology

15

EVENTS

15 | Hoag Drive-in Reunites the Community and Raises Funds for Hoag's COVID-19 Efforts
16 | 54th Annual Christmas Carol Ball Raises Over \$1.2 Million

18

DONOR TRIBUTE

18 | Retired Real Estate Broker Gives \$5 Million Gift to the Jeffrey M. Carlton Heart & Vascular Institute

19

COVID-19 SUPPORT FUND UPDATE

19 | Facing COVID-19 Head On

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LETTER FROM THE CHAIR

Dear Friends of Hoag,

Though I have been closely involved with Hoag for many years, I continue to be amazed by the extraordinary generosity of our donor community. Hoag's first comprehensive campaign came to a close at the end of 2020, \$133 million above and beyond an already lofty goal of \$627 million. When we reached our Campaign goal 18 months ahead of schedule, important areas of need remained, so you continued to give.

Today, we celebrate the \$760,206,055 raised during the Hoag Promise Campaign and every donor and volunteer who contributed to making it possible. While Hoag dreams big, it is your support that helps those dreams become reality. The Campaign accelerated health care innovation and advancements at Hoag like we've never seen before. Hoag and the communities we serve will never be the same. You will read more about this in our cover story, which details the life-changing impact of your support of Hoag Promise.

Also in this issue, we highlight Julia & George Argyros' recent transformative gift—a profound reflection of their deep commitment to Hoag nurses. You will read about the inspiring generosity of Sue Gross and her dedication to advancing critical health services in Orange County. We introduce you to the newly opened Fudge Family Birthing Suites at Hoag Hospital Irvine as well as Orange County's first MRI-guided radiation therapy system. Housed in the Dean & Gerda Koontz Radiation Oncology Center at Hoag Family Cancer Institute, it is a game changer for cancer care.

Hoag is accomplishing extraordinary things thanks to the visionary generosity of each and every donor. Our entire community benefits. As we close the chapter on the Hoag Promise Campaign and look toward a bright future, it is my privilege to thank you for your unwavering commitment to Hoag and to the health of our community.

Sincerely,



Kathleen M. Armstrong
Chair, Hoag Hospital Foundation Board of Directors



MESSAGE FROM THE PRESIDENT

Celebrating Your Generosity

The Hoag Promise Campaign, Our Campaign to Lead, Innovate and Transform was an overwhelming success, and it was all because of you.

Of the 24,174 total donors who supported Hoag Promise, 17,856 of them were new donors to Hoag. That is simply remarkable. Though Hoag continues to grow nationally in scope and reputation, community partnership remains fundamental to who we are. Your extraordinary support during the Campaign once again proved this true. This special partnership inspires all of us at Hoag to bring our very best every day. Thank you for your remarkable generosity and for being a valued member of the Hoag family.

The Campaign has forever transformed health care in our community by allowing Hoag to grow and innovate in ways that otherwise would not be possible. Because of you, Hoag's workforce is among the most educated in the country. Because of you, Hoag is a leader in cutting-edge technology, provides access to pioneering clinical trials and has launched new programs and services on par with, and in some cases more advanced than, those found at academic institutions. Your support helps Hoag attract the world's leading physicians and has contributed to Hoag's standing as the highest ranked hospital in Orange County for four years in a row. I am personally grateful to each of you who helped make this possible.

From its earliest days, Hoag has been a cherished and invaluable resource for the community. Through its philanthropic engagement, the community has demonstrated its commitment to ensuring Hoag remains available to all who need it. Thank you for being part of furthering that important legacy with your support of the Hoag Promise Campaign. Not only have you impacted countless lives, you have helped position Hoag to lead boldly into the future.

Sincerely,



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



HOAG PROMISE

OUR CAMPAIGN TO LEAD,
INNOVATE & TRANSFORM

HOAG PROMISE CAMPAIGN EXCEEDS ALL EXPECTATIONS

On December 31, 2020, Hoag completed its first-ever comprehensive campaign. Hoag Promise, Our Campaign to Lead, Innovate and Transform was a ten-year philanthropic effort that engaged community and clinical leaders across the entire organization, challenging them to think strategically about what they and their teams required to transform health care over the next decade and beyond. They dreamed big, and they made bold plans that could only be realized through significant philanthropic support. And in response, you stepped up in a big way. You gave generously. You got involved. You engaged your fellow community members. You inspired us. Thanks to you, the Hoag Promise Campaign exceeded all expectations.

Your support of Hoag Promise touched every area of Hoag. Because of you, Hoag is delivering on its promise to provide the highest level of care to our community. Because of you, Hoag continues to lead, not follow.

THANK YOU

YOUR SUPPORT BY THE NUMBERS

\$760,206,055

Total Dollars Raised

90,170 Total Gifts

24,174 Total Donors

373 Volunteer and Physician Leaders

17,856 New Donors

YOUR GIFTS AT WORK

LEAD

100+ Positions

FROM CARE NAVIGATORS TO CLINICAL RESEARCHERS
TO PROGRAM SPECIALISTS AND MORE

19 New Endowed
Chairs

UNDERSCORING HOAG'S NATIONAL
LEADERSHIP IN INNOVATIVE
TREATMENT AND RESEARCH

INNOVATE

200+ Equipment and
Technology

FROM IMAGING TO ROBOTICS
TO VIRTUAL REALITY

30+ Advances
in Care

DEBUTED
AT HOAG

TRANSFORM

96 Named
Spaces

FROM INSTITUTES TO CENTERS
TO PROGRAMS TO BUILDINGS

3,012 Scholarships

ADVANCING EDUCATION FOR HOAG NURSES AND EMPLOYEES

TRANSFORMATIONAL IMPACT

The Hoag Promise Campaign transformed health care in our community. Your generosity funded innovative medical advancements, new and expanded programs, groundbreaking research, leading-edge technology, life-changing education, state-of-the-art facilities and exceptional clinical staff across Hoag. The collective result is the enhanced health, well-being and strength of our community. Achieving our Campaign goal ensures that Hoag will keep its promise to provide the level of care this community expects and deserves. Countless patients and families will benefit for years to come.

IN RECOGNITION AND GRATITUDE CAMPAIGN VOLUNTEER LEADERSHIP

We owe an immense debt of gratitude to the hundreds of community leaders and Hoag physicians who gave their time and energy to serve as Campaign volunteers. They were the driving force behind the Hoag Promise Campaign. They engaged with Hoag and the priorities of the Campaign at the deepest level. They provided invaluable insight and advice. They extended our reach by introducing Hoag to their friends and networks. They were with us every step of the way and were personally invested in Hoag's success.

THE POWER OF COMMUNITY

Hoag was built by the community for the community. The Hoag Promise Campaign strengthened that legacy, engaging longtime friends of Hoag, mobilizing passionate volunteers and inspiring thousands of new donors. This united support is the reason for Hoag's success and lights the path to our bright future. From all of us on the Hoag Promise Campaign Leadership Council, thank you for your support!

HOAG PROMISE CAMPAIGN LEADERSHIP COUNCIL:



Dick Allen
DICK ALLEN



Terry Anne Callahan
TERRY CALLAHAN



Pei-Yuan Chia
PEI-YUAN CHIA



Jim Coufos
JIM COUFOS



David Horowitz
DAVID HOROWITZ



R. D. Kirwan
ROGER KIRWAN



Karen J. Linden
KAREN LINDEN



Ginny Ueberroth
GINNY UEBERROTH

PHYSICIAN CAMPAIGN LEADERSHIP GROUP

The Physician Campaign Leadership Group represents a unique and powerful partnership between Hoag and Hoag physicians. Members of the group went far above their daily responsibilities of patient care to engage with the Hoag Promise Campaign. Their contributions, insights and leadership were critical to the success of the Hoag Promise Campaign and helped further the culture of philanthropy at Hoag that will continue far into the future.

SPECIAL THANKS TO THE CHAIRS OF THE PHYSICIAN CAMPAIGN LEADERSHIP GROUP:



Michael Brant-Zawadzki, M.D., F.A.C.R.
*Ron & Sandi Simon Executive Medical Director
Endowed Chair, Pickup Family Neurosciences
Institute, Senior Physician Executive, Hoag*



**Allyson M. Brooks, M.D.,
F.A.C.O.G.**
*Ginny Ueberroth Executive
Medical Director Endowed
Chair and Chief Quality Officer,
Women's Health Institute*



**Kris V. Iyer, M.D.,
F.A.C.P., F.A.C.E.**
*Senior Vice President, Chief
Physician Development Officer,
Hoag*

PHYSICIAN CAMPAIGN LEADERSHIP GROUP CONTRIBUTIONS

\$5 Million
IN GIFTS GIVEN BY PHYSICIANS

140+
PHYSICIAN
VOLUNTEERS

357
EVENTS WHERE
PHYSICIANS PRESENTED

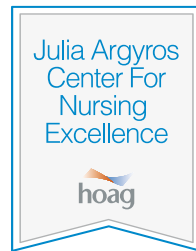
“ Since our founding, Hoag and the community we serve have stood arm in arm to ensure that outstanding health care is always available to Orange County residents, whenever they need it. Hoag Promise strengthened that commitment and took Hoag to new heights. On behalf of every patient Hoag serves, thank you for supporting this Campaign and ensuring our promise to deliver exceptional, personalized health care with compassion. ”

Robert T. Braithwaite
Hoag President and CEO



07-
08





A Legacy of Giving

Julia & George Argyros Give Additional \$7.5 Million Gift in Support of Nursing Excellence

The Hoag nurses who care for our patients every day play a significant role in Hoag's commitment to serve our community. Philanthropists Julia and George Argyros continued their support of nursing with an additional—and undeniably impactful—\$7.5 million gift in 2020. Their generosity will help to further enhance Hoag's nationally renowned nursing services.

“For many years, I have watched with great admiration as Hoag has used its resources to thoughtfully develop what is without question one of the nation's finest nursing services,” said Julia Argyros. “Hoag's nurses are incredibly talented, dedicated and compassionate.”

This transformative contribution from the Argyros family extends their legacy of giving and their deeply important role in growing Hoag's reputation as one of America's leading health care providers. Since the 1980s, Julia and George Argyros have given tens of millions of dollars to Hoag to advance care in numerous areas, including cancer, diabetes, nursing and heart & vascular. This latest gift builds upon ongoing generous philanthropy directed to Hoag nursing, which now totals a remarkable \$15 million. In recognition of the family's long history of leadership giving, including a prior gift of \$7.5 million in 2016, Hoag established the Julia Argyros Center for Nursing Excellence the same year.

Building on Generosity

Julia and George's most recent gift allows Hoag to build upon the momentum of their earlier gifts, propelling our nursing services beyond our current capabilities while significantly broadening the reach of the Julia Argyros Center for Nursing Excellence. It also helps drive Hoag beyond generalized nursing to a comprehensive corps of nurse specialists, laying the groundwork for the next transformation of nursing at Hoag.

This gift elevates Hoag's care by exponentially expanding advanced nursing education and strengthening Hoag's ability to further increase its BSN rate and master's level learning opportunities.

To date, the Argyros' support has provided scholarships to more than 1,300 Hoag nurses. As a result, 83.2% of Hoag nurses have received their Bachelor of Science in nursing (BSN) degrees, and many have gone on to receive advanced degrees.

Due in large part to this focus on continued education, Hoag's nursing services were once again redesignated for the prestigious Magnet® recognition in 2020. Awarded by the American Nurses Credentialing Center, the designation is the highest honor an organization can receive for professional nursing practice. Only 8% of U.S. hospitals achieve Magnet® recognition. Hoag is among only 3% who have achieved the distinction four times in a row.

Very Real Impact

Julia and George are further enabling Hoag nurses to provide the highest standards of evidence-based practice while delivering excellent patient care, benefiting our entire community.

“As a direct result of Julia Argyros' extraordinary generosity and kindness, her name has become synonymous with Hoag's commitment to nursing excellence,” said Flynn A. Andrizzi, Ph.D., president of the Hoag Hospital Foundation. “The enormity of the impact of her gifts is incalculable. It is safe to say that every nurse scholar at Hoag, and every patient and family member whose lives they touch, has good reason to be grateful to her. All of us at Hoag certainly are.”

It's Personal:

Family Experiences Inspire Latest Gifts from Sue J. Gross

Generosity and gratitude lie at the heart of renowned Orange County philanthropist Sue Gross' most recent donations to Hoag. Her newest gifts through the Sue J. Gross Foundation include \$5 million to the Hoag Breast Center and \$1 million to Hoag's Wound Healing and Hyperbaric Medicine Center. Gross' inspiration is both personal and altruistic, reflecting the experiences of loved ones as well as her enduring commitment to enhancing health care for the broader community.

“Many women I have known have bravely faced breast cancer, including my mother and two sisters,” Gross said when making her gift from the Sue J. Gross Foundation. “I’m proud to be able to make this gift in all of their honors.”

In gratitude for her major gift, Hoag renamed the Sue J. Gross Comprehensive Breast Center, located within the Women’s Health Institute. “My wish is that this contribution will serve as a beacon of hope for all women battling this disease,” Gross said. This new gift further expands her commitment to supporting all aspects of women’s health and to enhancing the programs and critical services in the Breast Center, especially important during the COVID-19 pandemic.

“I have long cared about supporting quality health care in Southern California, particularly in my local community of Orange County.”

“We are encouraging women to resume their annual breast imaging,” said Allyson Brooks, M.D., F.A.C.O.G., Ginny Ueberroth Executive Medical Director Endowed Chair and Chief Quality Officer, Women’s Health Institute, noting that many women delayed their screenings during the pandemic.

“Sue Gross’ compassion and concern for the health and well-being of women is remarkable,” said Flynn Andrizzi, president of the Hoag Hospital Foundation. “This latest gift will enable us to continue our pioneering care in breast cancer and our ongoing quest to once and for all help discover a cure for a disease that impacts the lives of millions of women around the world.”

A Life Saved—A Gift in Gratitude

Gross’ \$1 million gift to the Wound Healing and Hyperbaric Medicine Center is equally personal and impactful, reflecting her gratitude to doctors for saving her brother-in-law’s life. Dr. Joseph Warpinski suffered a significant wound, and doctors in Wisconsin, where he lives, said he might not survive more than a few days. Gross urged Dr. Warpinski to come to Hoag’s comprehensive wound healing

center, where Sally Warpinski—who is his wife and her sister—had undergone treatment just one year earlier.

“Sally and I went through quite an ordeal that went from bad to worse until we got to Hoag, and the incredible doctors, nurses and staff at Hoag turned it around for me,” Dr. Warpinski said.

In appreciation of Gross’ gift, Hoag named the Sally & Joseph Warpinski Wound Healing and Hyperbaric Medicine Center. The Center, which partners with Healogics®, was recently honored with the Center of Distinction Award for achieving outstanding patient outcomes for 12 consecutive months.

“We don’t think wound care receives the recognition it deserves as most of us don’t realize just how dire your situation can become—and how important the work the doctors in this field do is—until you experience it for yourself or through a loved one. Because of this, we are so pleased and honored to have this center named after us,” Dr. Warpinski said.

The reach of Gross’ gift will extend far beyond her own family. “This wonderful gift from the Sue J. Gross Foundation is just the latest example of Sue’s remarkable generosity and lifelong affection for Orange County and her concern for the well-being of its residents,” said Andrizzi.

Through the Sue J. Gross Foundation, and as past president of the Gross Family Foundation, Gross has long supported issues she cares deeply about with major financial gifts that have expanded quality health care services available to Orange County residents.

Prior to these two gifts totaling \$6 million, past support from Gross includes a \$20 million gift to fund comprehensive women’s services at Hoag. Hoag renamed its women’s health care facility the Sue & Bill Gross Women’s Pavilion. For many years, it was the largest gift in Hoag’s history. Another gift funded the Gross Family Foundation Endowed Chair in Oncoplastic Breast Surgery, which is held by renowned oncologist Dr. Melvin J. Silverstein, medical director of the Sue J. Gross Comprehensive Breast Center.

Indeed, her most recent gifts add to a remarkable legacy of giving to Hoag through the years.



Fudge Family Birthing Suites Open at Hoag Hospital Irvine

In December 2020, Hoag Hospital Irvine proudly opened 12 new birthing suites that reimagine the evolving trends in maternity care, allowing mothers and their loved ones to experience a one-of-a-kind birthing experience.

The suites were named in honor of Orange County philanthropist Gary Fudge, who is passionate about using his philanthropy to elevate the health care experience. Additional visionary donors who made the space possible include Kathie and Dwight Armstrong, Mark and Cheryl Hardtke, The Harriet E. Pflieger Foundation and the Tsao Family.

“Fudge Family Birthing Suites was designed by women for women to nurture them through this incredible moment. We listened to women at all stages of the birthing journey and created an ideal set of services to exceed their expectations,” said Allyson Brooks, M.D., F.A.C.O.G., Ginny Ueberroth Executive Medical Director Endowed Chair and Chief Quality Officer, Women’s Health Institute.

A New Kind of Birthing Experience

The Fudge Family Birthing Suites reimagine pregnancy, delivery and recovery for modern families with private birthing suites, a perinatal VR guided

program and a calming outdoor walking garden. The new suites offer the ability to labor, deliver and recover in the same room as well as two C-section operating rooms and a nursery staffed 24/7 by an expert team, including OB/GYN hospitalists, certified nurse midwives and board-certified anesthesiologists and neonatologists. Located on the first floor of the hospital, the Fudge Family Birthing Suites offer the Tsao Family Garden, an adjacent private outdoor walking space that serves as a calming influence on expectant mothers.

Growing Hoag’s Commitment to Care

The 31,600-square-foot labor and delivery suites will help meet the growing need for maternity services in Irvine. Rapid growth in and around Irvine has resulted in an expanding population of households with young children. From baby Riley, the first baby born in the new Fudge Family Birthing Suites on December 8, 2020, to hundreds of new babies delivered in the first months since opening, Hoag’s commitment to Irvine and the surrounding communities is focused on expanding convenient access to world-class care.





Hoag Family Cancer Institute Is First and Only in Orange County to Offer Groundbreaking Radiation Technology

Thanks to a \$9 million gift from best-selling author Dean Koontz and his wife Gerda, Hoag recently became the first hospital in Orange County and the second in California to acquire the most advanced radiation treatment system available in the United States. The ViewRay MRIdian® linear accelerator system adds greater precision to radiation treatment by combining a diagnostic quality MRI scanner with a radiation linear accelerator. This revolutionary technology allows oncologists to pinpoint tumors during radiation treatment—even in some of the most difficult-to-target areas in the body, including the pancreas, lungs and other soft tissue tumors. Not only does the advanced treatment improve outcomes and decrease side effects from radiation therapy, it provides options for patients with tumors who were not previously candidates for radiation therapy.

In recognition of the Koontz's generosity, Hoag named the Dean & Gerda Koontz Radiation Oncology Center at Hoag Family Cancer Institute.

"The addition of the MRIdian® linear accelerator is yet another example of how Hoag is committed to

delivering the most advanced, most effective cancer care to our community," said Burton L. Eisenberg, M.D., Grace E. Hoag Executive Medical Director Endowed Chair, Hoag Family Cancer Institute. "Through the generosity from people like Dean and Gerda Koontz and visionary leadership from Hoag's world-renowned oncology physician team, Hoag continues to be at the forefront of technology and cancer therapy."

Already, doctors and patients are realizing the benefits of the ViewRay MRIdian® linear accelerator



next-generation technology, which is especially beneficial when treating tumors that are mobile or adjacent to structures that are mobile.

“Our bodies are constantly in motion,” said Craig Cox, M.D., medical director of Hoag Radiation Oncology. “Our lungs move as we breathe, our diaphragms contract and relax and any tumor or adjacent organ will shift accordingly.” One of the fundamental challenges in radiation oncology is how to hit a moving target, even when the patient is lying still. “With real-time MRI-guided therapy, we now can treat with exact precision. We can see the target, we can see the critical normal tissue we want to avoid and react appropriately,” Dr. Cox noted. For example, if a patient’s tumor were to shift due to breath or internal organ movement, the machine would stop the delivery of radiation and allow physicians to adjust their approach in real time.

“The adaptive planning and real-time tracking capabilities immediately make radiation therapy more precise, safer and more effective—we are able to change our radiation plan on the fly and react

to the conditions of the day, or even the fraction of a minute,” said Peter Chen, M.D., Hoag radiation oncologist.

“This in and of itself is very exciting, but there are also intriguing possibilities for the future,” he added, noting that researchers are investigating how the MRI profile of a tumor changes over the course of treatment. “This data may allow us to better monitor or predict a patient’s outcome, with the ultimate goal of adapting a radiation plan based on the tumor’s MRI response, leading to a personalized dose plan, with no more and no less radiation than needed.”

Thanks to the Koontz family, MRI-guided radiation therapy is already shaping the future of cancer care at Hoag, and Dr. Cox said its role in better outcomes and improved quality of life make it a game changer. “At Hoag, we are fortunate to have the community support that allows us to be early adopters not just of the latest technology but of technology that is changing how we approach cancer care.”





Hoag Drive-in Reunites the Community and Raises Funds for Hoag's COVID-19 Efforts

Last fall, Hoag Hospital Foundation hosted Hoag's first-ever Drive-in event, a special evening of entertainment and connection—all from the comfort and safety of attendees' own cars. Hoag's closest supporters and friends reunited, from a safe distance, in celebration of Hoag clinicians and staff who have worked tirelessly and selflessly to serve our community during these challenging times.

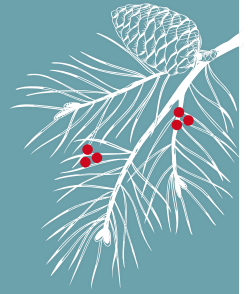
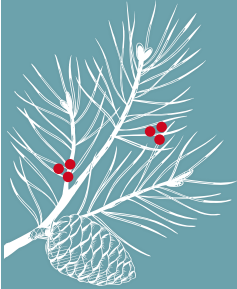
The event, which took place at the OC Fair & Event Center, featured a special drive-in screening of *Grease* while guests enjoyed individually packaged gourmet sips and bites, including nostalgic concession snacks and retro sodas.

Proceeds from the Hoag Drive-in supported Hoag's COVID-19 Support Fund.

"We were overwhelmed by the support from our community to not only come together safely during these unique and challenging times but celebrate and honor Hoag's COVID-19 efforts in our community," said Flynn A. Andrizzi, Ph.D., president, Hoag Hospital Foundation. "Safe, community connection on a warm night was exactly what our community members were craving, so we were thrilled to curate an evening of entertainment and connection while helping Hoag safely equip our nurses and physicians to serve all who come to Hoag."



54th Annual Christmas Carol Ball



A Virtual 12-Day Experience Raises Over \$1.2 Million

Since 1966, Hoag's magnificent Christmas Carol Ball has brought us together over the holidays to celebrate our beloved hospital and its profound impact on our community. In 2020, we successfully pivoted with a virtual celebration, which still filled our hearts with holiday delight and magic—safely from the comfort of our homes—while raising over \$1.2 million in support of Hoag.

The festive experience featured 12 days of holiday delight with one-of-a-kind items from our silent auction. Auction items included a signed helmet, jersey and football from our valued partner the Los Angeles Chargers as well as a 12-month lease from longtime Hoag supporter Sterling BMW on a 2021 4 Series 430i two-door coupe.

On the twelfth and final day of the virtual event, supporters were treated with a warm and festive gratitude message from event chairs Carolyn and Gary McKitterick, kicking off the holiday season.

We are grateful to our generous and compassionate donor community, who helped us keep the Christmas spirit alive during this exceptionally unique holiday season.

We thank all of the generous auction item partners, underwriters and supporters for their participation. We're looking forward to celebrating the 55th Annual Christmas Carol Ball on December 11, 2021.

"We'd like to express our collective abundance of gratitude and appreciation for the tremendous generosity from our community members in support of Hoag's COVID-19 efforts. We were thrilled to be able to uphold this cherished, holiday tradition and join Hoag in honoring our health care heroes and advancing their critical work in this unique climate."

~Carolyn and Gary McKitterick
Chairs, 54th Annual Christmas Carol Ball



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. For more information , please contact Julie Heggeness at (949) 764-7206 or Julie.Heggeness@hoag.org



HARMAN & VIRGINIA HARROLD PAVILION

500

Retired Real Estate Broker Gives \$5 Million Gift to the Jeffrey M. Carlton Heart & Vascular Institute

Born and raised in Ohio, Harman “Jack” Harrold came to California to attend the University of California, Los Angeles. Little did he know, an exciting career in commercial real estate was right around the corner.

While a UCLA student, Jack befriended a real estate developer who sold him an apartment building near campus. Jack rented the apartments to UCLA professors, students and staff. Realizing his aptitude for real estate, Jack dropped out of school and embarked on a full-time career as a successful real estate broker.

He made Los Angeles his home and soon met his late wife, Virginia. The two met in Orange County while they were each visiting Laguna Beach, though they were both living in Los Angeles at the time. Virginia and Jack loved to travel and enjoyed many international trips together.

Giving Local

Being active was a way of life for Jack. He was an avid sailor, loved bike riding and skied regularly until he was 80 years old. Now a resident of Corona del Mar, Jack feels fortunate to be in good health, but when he needed some routine medical care, he

turned to Hoag. Consistently impressed with his physicians and experience every step of the way, Jack “always felt like [he] was in excellent hands.”

Recently, Jack began considering where he might make a significant philanthropic commitment to honor Virginia’s memory. Hoag immediately came to mind. “I wanted to give back to a charity that I know and one that is close by now that I live in this community,” Jack says. He connected with Julie Heggeness, J.D., C.S.P.G., T.E.P., executive director of gift planning and legal for Hoag Hospital Foundation, for assistance in sorting through the details of his gift.

Jack designated his support to the Jeffrey M. Carlton Heart & Vascular Institute. His generosity will enhance and expand Hoag’s capabilities in providing specialized care to patients with valve disease, vascular disease and cardiac arrhythmia. The newly named Harman & Virginia Harrold Pavilion at the Hoag Health Center Newport Beach—Mike & Lori Gray Campus is a testament to the power of philanthropy.

Grateful to support a local organization he trusts, Jack looks forward to the impact his giving will make on patients both now and in the future.

19-
20



Facing COVID-19 Head On

Donors Contribute More Than \$8.3 Million to Date in Support of Hoag's COVID-19 Efforts

When COVID-19 hit in early 2020, Hoag leaders sprang into action to ensure the safe care of our community, and donors began asking how they could help. Hoag Hospital Foundation created the COVID-19 Support Fund to assist Hoag in caring for those affected by the virus as well as the caregivers and staff working tirelessly to treat them.

Private and corporate donors have contributed more than \$8.3 million to the COVID-19 Support Fund. This generosity has enabled Hoag to act swiftly and proactively in response to an evolving situation. In addition to being prepared with sufficient personal protective equipment (PPE) and other necessary supplies, philanthropy has positioned Hoag to be

among a small and elite group of health care systems across the country to conduct clinical trials for COVID-19 treatment, vaccine testing and preventive care. Because of the fast-moving and ever-changing nature of the pandemic, Hoag leadership directs dollars from the COVID-19 Support Fund to emergent needs as they arise, ensuring Hoag is prepared to meet the challenges of the virus.

Hoag Is COVID Strong

Thanks to Hoag's expert medical team and generous donor support, Hoag continues to lead and provide hope through an unprecedented global pandemic in our community and beyond.

IMPACT BY THE NUMBERS

\$8,300,000 Raised to Date

Implemented new COVID-19 safety measures at



9

Health Care Centers

13

Urgent Care Centers

3

Hospitals



2M+

Face Masks

issued to keep patients, staff and community safe



Enrolled

3,709

Hoag Employees

570

Hoag Patients in COVID-19 clinical trials



Provided access to COVID-19 tests for

80,470

Patients Across Orange County

Advanced

35

COVID-19 Clinical Trials

Hoag Hospital Foundation
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CELEBRATING

HOAG PROMISE

OUR CAMPAIGN TO LEAD,
INNOVATE & TRANSFORM

May 6, 2021, 6:00 PM

Join us as we recognize the generosity and enthusiasm of you—our donors, volunteer leaders and Hoag community—during our virtual Hoag Promise Campaign finale celebration.

Visit hoagpromise.com for more details.
Inquiries: (949) 764-7309 or hhfevents@hoag.org