

A Hoag Hospital Foundation Publication

SCANNER

WINTER EDITION

2018



A Legacy of Generosity

Hoag Hospital Irvine Names the Benjamin & Carmela Du
Emergency Pavilion to Recognize Transformational Gift

hoag
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Foundation

HOAG
PROMISE

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Endowed Chair

LETTER FROM THE CHAIR

Dear Friends of Hoag:

As we move into the home stretch of our Hoag Promise Campaign, we are witnessing many exciting developments made possible by philanthropy.

We were proud to dedicate the Benjamin & Carmela Du Emergency Pavilion in honor of visionary donors, Ben and Carmela Du. The opening of the Du Emergency Pavilion at Hoag Hospital Irvine was a testament to the power of community support.

Missy Pace Callero and Chris Callero, along with David and Michelle Horowitz, were our lead donors for the Du Emergency Pavilion project. Their early support encouraged us tremendously and I believe it inspired others. You can read more in our cover story.

In this issue, you will get to know Jim and Martha Newkirk, long-time friends of Hoag who established our 13th Endowed Chair, awarded to Anthony Caffarelli, M.D., Newkirk Family Endowed Chair in Aortic Care. Normally found in academia, endowed chairs support our physician leaders in advancing their fields and assist Hoag in recruiting top clinicians.

We are pleased to report on our 2018 Volunteer Summit, an event that recognized and honored the impact of our more than 250 Hoag Promise Campaign volunteers. We also remember a great friend, Tom Casey, who served Hoag as a volunteer for many years. The more I learn about the dedicated volunteers who have come before me, the more I appreciate the privilege of advancing their legacies into the future.

I would like to acknowledge and thank the inaugural Hoag Innovators Fund donors. It's one thing to marvel at new technology and treatments we could not have imagined a decade ago. It's another to play a part in proactively bringing innovation to Hoag. I'm deeply grateful for the generosity and fellowship of this group.

At this time of reflecting and giving thanks, I extend my appreciation to all of our donors and volunteers for believing in Hoag's vision and throwing their support behind it.

Sincerely,



Robert Brunswick
Chair, Hoag Hospital Foundation Board of Directors



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BENJAMIN &

COVER STORY

A Legacy of Generosity

Hoag Hospital Irvine Names the Benjamin & Carmela Du Emergency Pavilion to Recognize Transformational Gift

Ben Du remembers the day in August when he toured the final phase of construction of the newly expanded and enhanced Emergency Department at Hoag Hospital Irvine. As a member of the Hoag Hospital Foundation Board of Directors, Ben was invited on the tour to update him and his fellow board members on this important Hoag project.

“I saw a state-of-the-art emergency facility and I thought it was very good for the area,” he says. He knew that with the continued growth of the region, which is home to more than 15,000 businesses, there is an immediate need for Hoag to grow with the communities it serves.

Although he and wife Carmela call Newport Beach home, Ben wanted to be part of the effort to bring the finest emergency services and facilities to the Irvine and South County communities. Ben brought Carmela back to Hoag Hospital Irvine for a tour.

When she saw the beautiful 13,500 square-foot-facility expansion and learned of the best practices that ensure the highest level of compassionate care, Carmela was on board with the idea to make a generous gift in support of the Emergency Department renovation and expansion project.

Ben and Carmela made a \$5 million gift to the project, the largest gift to date in the history of Hoag Hospital Irvine. In recognition and gratitude, Hoag named the Benjamin & Carmela Du Emergency Pavilion at Hoag Hospital Irvine.

Building on Success

Growing up in the Philippines, Carmela remembers her family giving to the church. When she and Ben first immigrated to the U.S. in 1967, she never imagined that they would have the privilege to give as generously as they have over the years.

& CARMELA DU EMERGENCY PAVILION



In 1976, Ben founded Flojet Corporation, a leading manufacturer of positive displacement pumps and other electro-mechanical components with facilities in Irvine, England and China. Carmela managed the office while raising their daughter, Lizette.

As the business grew, Ben became a respected leader in the business world and together they became generous donors to Hoag. Upon selling Flojet, Ben and Carmela traveled the world, filling their home with beautiful art, furnishings and collectibles—all with interesting stories about how they found them.

A Family Legacy

The couple's first major gift to Hoag established the Benjamin & Carmela Du Endowed Chair in Urologic Oncology. In 2015, Jeffrey Yoshida, M.D., program director of urologic oncology at Hoag Family Cancer Institute, became the eleventh Endowed Chair holder thanks to their generosity.

Drawn to making gifts with a big impact on patient care, the Dus are thrilled that their giving will affect generations to come. "We're very excited to make this a reality," Ben says. "After learning all that they have planned, we know that Irvine residents will have access to outstanding care and an advanced facility."

When they told Lizette and their two granddaughters the news, the entire family was excited by the couple's decision to support Hoag. "Lizette smiled because she understands the importance of giving back," Carmela says. "It will be part of our family legacy."

A Grateful Community

Marcy Brown, senior vice president, Hoag Hospital Irvine & Ambulatory Services, expresses the gratitude felt by the Hoag Irvine team for the Du's generosity. "What the Dus have done is tremendous and will help us transform health care in our growing community through improved patient experience in the emergent care setting."

With a patient-centered design, the Benjamin & Carmela Du Emergency Pavilion will provide exceptional emergency care for our community now and for future generations. "On behalf of the countless patients we will serve in the years to come, I thank Ben and Carmela Du for their giving spirits," says Robert T. Braithwaite, Hoag president and CEO. "By providing the funding to enhance the Emergency Department experience for all concerned, their giving is truly a win-win for Hoag and the community at large."

DONOR HONORS

A Milestone in Hoag's History

Celebrating the dedication of the Benjamin & Carmela Du Emergency Pavilion at Hoag Hospital Irvine

At a dedication celebration on October 26, Hoag Hospital Irvine unveiled the much-anticipated Benjamin & Carmela Du Emergency Pavilion – the new, state-of-the-art Emergency Department expanded the facility to nearly five times its original size.

During the program, Hoag Hospital Foundation President Flynn A. Andrizzi, Ph.D., remarked on the role played by philanthropy and recognized the donors who made the project possible. “One of the things we are most proud of when it comes to this project is the generous support of so many community members,” he said. “Without your generous backing of this vital asset, this project would not have happened.”

On behalf of a grateful community, we extend our deepest appreciation to the donors who supported the Benjamin & Carmela Du Emergency Pavilion and were recognized with named spaces:

- Callero Family Foundation Atrium
- Horowitz Family Lounge
- Daphne & Kai Liang High Acuity Treatment Room
- Jessica Liang & Andrew Kim High Acuity Treatment Room
- Pacific Life Foundation Courtyard
- D. & D. Sun High Acuity Treatment Room
- Healy Family Triage Room
- Nancy & David P. Bushnell Triage Room
- Binder Family Patient Results Waiting Area

“When you think about how far-reaching these families’ gifts will be to the community for years to come, it’s truly staggering,” says Robert T. Braithwaite, Hoag president and CEO. “The generosity of the Dus and the others who’ve helped bring this to fruition is deeply appreciated, and the work done every day in this Emergency Department will be a testament to their spirit, their heart and their vision.”

For more information on how you can support the Benjamin & Carmela Du Emergency Pavilion, please contact C.C. Hafner at (949) 557-0246 or CC.Hafner@hoag.org.



05-06



Lead Donors Got the Ball Rolling

Special thanks to donors Missy Pace Callero & Chris Callero and David & Michelle Horowitz for being the first to make \$1 million naming gifts to support the Benjamin & Carmela Du Emergency Pavilion. Their early support started the momentum that has led to raising more than \$8.5 million to date in support of this project.



“Supporting our community is important to us. We wanted our gift to serve as many people as possible and we knew a gift supporting the Emergency Department would touch a lot of people in a positive way during a stressful time. We are thrilled with the investment Hoag has made and we are proud to lend our support.”

Missy Pace Callero & Chris Callero



“On behalf of the Horowitz family, we would like to congratulate Hoag, Marcy Brown and her team for the phenomenal job they have done for our broader community. There is no space between Hoag and the community they serve. They have proven it yet again. Thank you.”

David & Michelle Horowitz

DONOR HONORS

Fudge Family Acute Rehabilitation Center Dedication

Donor Changes the Trajectory of Rehab Care Available to Hoag Stroke and Brain Injury Patients

On June 13, dedicated volunteer leader and philanthropist Gary Fudge proudly cut the ribbon to officially open the Fudge Family Acute Rehabilitation Center.

If anyone understands the importance of quality post-stroke rehabilitation, it's Gary, who fought his way back from a hemorrhagic stroke followed by 20 days in Hoag's neurological ICU. Once released, Gary was ready to transition to rehabilitation therapy. Finding a lack of quality local options, his family opted for home care.

Gary and his family discovered that while Hoag provided a nationally ranked acute stroke program, patients requiring intensive inpatient rehabilitation services after discharge had to find another provider. Today, thanks to Gary's extraordinary support, thousands of Hoag patients can now receive the full spectrum of care right here at the

newly opened Fudge Family Acute Rehabilitation Center at Hoag Hospital Newport Beach.

"I've come to learn that the care at Hoag is unbelievable because everyone here has great hearts and dedication," Gary said. "For a hospital to be one of the best in the country, philanthropy has to be really successful. Dr. Brant-Zawadzki and his team deserve great praise for this program."

A long-time friend of Hoag, Gary made his first major gift in 2014 to name the Fudge Family Advanced Imaging Suite at Hoag Hospital Newport Beach. He's gone on to serve as a member of the Hoag Promise Campaign Steering Committee and the Pickup Neurosciences Institute Campaign Advisory Committee.





A New Hope for Hoag Patients

The Fudge Family Acute Rehabilitation Center provides customized programs to help patients improve function, attain their greatest level of independence and return to community living. In addition to 18 spacious patient rooms – many with inspiring views of the Newport Harbor and the Pacific Ocean – the expansive facility supports neurological, orthopedic and traumatic brain injury patients with:

- A fully equipped gymnasium for the full range of physical and occupational therapy
- Dedicated conference spaces for physician rounds, family consultations and speech therapy
- A therapy “apartment” complete with a regular-sized bed, a working kitchen and bathroom
- Outdoor therapy space that includes a garden with various paved and unpaved walkways, a putting green and a Smart Car

The Fudge Family Acute Rehabilitation Center also offers virtual reality (VR) technology. In a safe environment, patients don VR goggles to play “games” that exercise various motor functions and allow physicians to monitor and analyze progress. They also enjoy meditative, calming virtual environments to help them relax during procedures or when they need a temporary escape from the hospital environment.

“What our community is doing, thanks to people like Gary, is ensuring that Hoag is a nationally recognized leader in care,” said Michael Brant-Zawadzki, M.D., FACR, Ron & Sandi Simon Executive Medical Director Endowed Chair, Pickup Family Neurosciences Institute and Hoag’s senior physician executive. “When Gary was being treated for his condition, he befriended us and after recovery, asked us, ‘what can I do?’ His friendship and generosity have helped nourish and sustain Hoag as a world-class health care partner for and with our community.”

For more information, please contact Stacy Skwarlo at (949) 764-7210 or Stacy.Skwarlo@hoag.org.

HOAG PROMISE CAMPAIGN



2018 Volunteer Summit

Honoring and Celebrating Our Hoag Promise Campaign Volunteers

The Hoag Promise Campaign Leadership Council led the Hoag Promise Campaign 2018 Volunteer Summit hosted by Hoag Hospital Foundation. The purpose of the evening was to celebrate the impact made by Hoag Promise Campaign volunteers since the public launch of the Campaign in 2015.

Hoag Hospital Foundation President Flynn A. Andrizzi, Ph.D., shared that since the launch of the Hoag Promise Campaign, 22,000 donors have made nearly 80,000 gifts. That includes \$110 million given directly by our 252 Hoag Promise Campaign volunteers.

“Our Hoag Promise Campaign volunteers are the heart of our Campaign,” he said. “We’re very grateful for your ardent support and advocacy on behalf of Hoag.”

Robert T. Braithwaite, Hoag president and CEO, shared his vision of Hoag’s promise for the future. “Ten years from now, there will emerge a handful of health care institutions that will have shifted away from fragmented care to integrated care with a reputation for excellence, unparalleled service and deliver excellent outcomes for patients,” he said. “With support from our philanthropic partners, Hoag will rank among those institutions.”

For more information about philanthropy’s impact on Hoag, please visit www.HoagPromise.org.



YOUR IMPACT
A FEW HIGHLIGHTS SINCE THE LAUNCH OF THE HOAG PROMISE CAMPAIGN

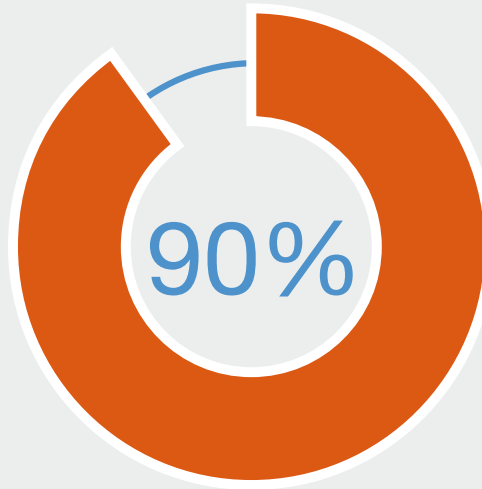
 22K Total Donors	78,784 Gifts given to date
 252 Volunteers	\$110 MILLION Total given by volunteers to date




Campaign Update

\$562M

RAISED TO DATE



\$627M

2020 CAMPAIGN GOAL

Campaign Duration: 2010 to 2020

Hoag Innovators

Taking Hoag from Steps to Leaps Forward

The Hoag Innovators, founded and led by Hoag Hospital Foundation Board Chair Robert Brunswick and Kitty Brunswick, is a group of philanthropists, entrepreneurs and community leaders who are leveraging the power of collective giving to move Hoag forward as a destination for world-class care. Hoag Innovators contribute at the Advocate level (\$250,000+) or above to the Innovators Fund which is allocated by the group to projects that advance innovation at Hoag.

Innovators gather twice a year and meet with Hoag's administrative and physician leaders to:

- Learn Hoag's innovation strategy and get an insider's view of the latest health care advances proposed for Hoag
- Collectively determine Hoag Innovators' annual fund allocation
- Truly make a difference in our community by supporting Hoag's culture of innovation

“This is a great opportunity to get an inside look at medical breakthroughs directly from Hoag physicians, and it's my hope that our group's activation will spur others to participate in supporting Hoag's innovation strategy.”

~**Robert Brunswick**
Hoag Innovators Co-Founder and
Chair, Hoag Hospital Foundation Board

For more information on getting involved with the Hoag Innovators, please contact Christy Ward at (949) 764-7238 or Christy.Ward@hoag.org.

IN MEMORIAM

Tribute to a Hoag Icon

Celebrating the Life of Tom Casey

A gentleman to his core, Tom Casey was from the old school of graciousness, generosity and keeping his word. He also had a great sense of humor. At the 2017 Hoag Heritage Society Luncheon, he won a giant stuffed stork for having the greatest number of children, grandchildren and great-grandchildren born at Hoag! According to his wife, Suzy Casey, he proudly displayed his prize at his office where he worked as a registered investment advisor in private practice until his passing on February 8, 2018.

Born in Fairhaven, Massachusetts, in 1929, Tom graduated from Culver Military Academy in Indiana and earned his BA from Bowdoin College in Brunswick, Maine. He was very proud to have served as a First Lieutenant in the U.S. Army during the Korean War. He received his MBA in 1957 from Stanford University and then moved to Laguna Beach where he met and married Tanya Seely Casey (1929-1996).

Tom and Tanya settled into their life in Newport Beach where six of their eight children were born at Hoag. In 1961, they took on a grand world adventure during which they traveled Europe and Asia. Three years later, they returned to Newport Beach where Tom began his career with First American Trust Company. He worked his way up to lead the company as president and director until his retirement in 1995.

After a lifetime of adventures, Tanya passed from ovarian cancer in 1996. Tom made a gift in her honor to benefit Hoag's Women's Health Institute.



A Dedicated Hoag Volunteer

Although he was a leader in the financial world, Tom made an impact on Orange County through his philanthropy, fundraising and volunteer service. In 1977, Tom joined the 552 Club where he also served as treasurer. An avid golfer, he helped recruit Toshiba America as the title sponsor of a PGA Senior Tour Event, then called the Toshiba Senior Classic. He was an enthusiastic participant every year.

Tom served on the Board of Directors of Hoag Memorial Hospital Presbyterian and Hoag Hospital Foundation and was a stalwart on various committees including Major Gifts Development. In 1989, he became a founding member of the Planned Giving Advisory Committee.

Tom's volunteerism paid off unexpectedly when he met Suzy, an accomplished fundraiser for California State University, Fullerton Business School. They married in 1996 and began a new adventure together traveling the world, golfing and biking. Suzy became a member of the Sandpipers, a volunteer group that supported Hoag, and a regular at Foundation events.

"Tom knew how to match people with an organization or group," Suzy remembers. "He was also a born student. He read newspapers and magazines daily and continued his formal education through his work as a trustee of Bowdoin College."

At Hoag, we will remember Tom's leadership and generosity. His dedication continues to impact us today and will be felt for many generations to come.

ENDOWED CHAIR PROGRAM





Hoag Appoints Thirteenth Endowed Chair

**Anthony Caffarelli, M.D., Named as
Newkirk Family Endowed Chair in Aortic Care**



On Wednesday, September 26, Hoag Hospital Foundation held an Endowed Chair Investiture ceremony to appoint Anthony Caffarelli, M.D., director of Hoag Aortic Center and co-director of Cardiothoracic Surgery at Hoag, as the Newkirk Family Endowed Chair in Aortic Care. The event honored decades-long friends and long-time supporters of Hoag, Martha and Jim Newkirk.



Martha and Jim were inspired to establish the Endowed Chair to recognize Dr. Caffarelli's leading-edge work in aortic valve repair. The Newkirk's gift will enable Dr. Caffarelli to contribute more to the field of research, train staff and educate and treat patients.



During his tenure at Hoag to date, Dr. Caffarelli has pioneered innovations that are improving and saving lives. In addition to performing complex aortic operations, he assembled a multidisciplinary outpatient team that provides surveillance for more than 950 patients enrolled in the Aortic Clinic. The Aortic Clinic team closely monitors and teaches patients with aortic disease, and their family members, how to pro-actively manage their health. Through personalized medicine, genetic testing is also implemented for patients and their family members who are at high-risk. Thanks to his leadership, Hoag is one of only 24 U.S. hospitals that perform over 50 surgical procedures for thoracic aortic aneurysms each year.



"Dr. Caffarelli is a surgeon of great passion and vision," said Robert T. Braithwaite, president and CEO of Hoag. "His commitment to patients goes beyond description. He's our 'Plus Ones' guy who takes the standards of excellence one step further. Tonight is our tribute to the excellence Tony has brought to Hoag and to our community."



Before expressing his heart-felt gratitude to the Newkirk family, to his team at the Aortic Center and to his wife and kids, Dr. Caffarelli joked, "I'd rather be in the operating room than about to give a speech. It is extremely humbling to stand up here. But tonight is not about us. It is about the patients we will treat."

Flynn A. Andrizzi, Ph.D., president of Hoag Hospital Foundation, said the gift will provide exponential benefits to our community. "The Newkirk's remarkable generosity changes the trajectory and level of care we offer at Hoag.



With the Newkirks' generous gift, Hoag has 13 Endowed Chairs in several specialties including cancer, cardiac care, memory loss and cognitive impairment, neurosciences, cardiovascular surgery, gastrointestinal disease, diabetes, breast care and women's health services.

EVENTS

Physician Campaign Leadership Group 5TH ANNUAL CELEBRATION DINNER

Hoag Hospital Foundation hosted the fifth Annual Physician Campaign Leadership Group (PCLG) Celebration Dinner in June. The PCLG empowers Hoag physicians to take on leadership roles in the Hoag Promise Campaign. Every year, Hoag Hospital Foundation honors and recognizes physicians who are partnering with us to educate potential new Hoag donors.

This year's program was led by PCLG Co-Chairs Michael Brant-Zawadzki, M.D., FACR, Ron & Sandi Simon Executive Medical Director Endowed Chair, Pickup Family Neurosciences Institute, Hoag senior physician executive; Allyson Brooks, M.D., Ginny Ueberroth Executive Medical Director Endowed Chair, Hoag's Women's Health Institute, chief quality officer, Hoag; and Kris V. Iyer, M.D., FACP, FACE, senior vice president, Hoag.

2018 Hoag Promise Physician Partnership Award Honorees

Alan Beyer, M.D., orthopedic surgeon at Hoag Orthopedic Institute, received this year's Hoag Promise Lifetime Achievement Award. Dr. Beyer was recognized for his unwavering enthusiasm in collaborating with Hoag Hospital Foundation and his consistent and positive impact on the success of the Hoag Promise Campaign.

The Hoag Promise Physician Partnership Award was awarded to Craig Cox, M.D., Radiation Oncologist and Medical Director of Radiation Oncology; and Heather Macdonald, M.D., Oncoplastic Breast Surgeon and Medical Director of Hoag's High-Risk Program at the Hoag Breast Center.



Special Guest Speaker

Keynote speaker Tom Telesco, general manager of the Los Angeles Chargers, praised the partnership between the Chargers and Hoag, which began in 2017 when the Chargers named Hoag as its official health care provider.

"In all of my experiences with the NFL, what separated all the other groups from Hoag was the culture," he said. "Everyone from the administration to the nurses and physicians and the facilities have been tremendous. Hoag is the best I've been around, and I can't thank you enough for the care and compassion you've shown to the Chargers family."





EVENTS



Those Summer Nights

2018 Hoag Summer Fest Sizzles with Food, Friends & Fun

The 2018 Hoag Summer Fest, hosted by the Hoag Hospital Foundation and the 552 Club, was a sold-out event with more than 1,500 guests raising more than \$261K for Hoag. The festival-themed event, held in June, included a Ferris wheel and was co-chaired by Drs. Valery and David Brouwer and community leaders Lauri and Steve Delson.

“For 31 years, this event has served as a way to bring the community together for a night of fantastic food, fun and entertainment and to benefit Hoag,” said Flynn A. Andrizzi, Ph.D., president of Hoag Hospital Foundation. “We are incredibly grateful for our community partners who have helped shape Hoag into what it is today and are also helping to determine what Hoag evolves into tomorrow.”

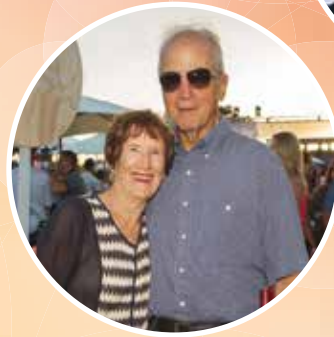
The Hoag Hospital Foundation thanks this year’s participating restaurants for so generously donating gourmet food and beverages:

A Restaurant	Georis Winery	RED O
Andrei’s Conscious Cuisine & Cocktails	Hi-Time Wine Cellars	Royal Thai Cuisine
Back Bay Bistro	Ho Sum Bistro	Rusty Pelican
Bayside Restaurant	Kéan Coffee	Sabatino’s Lido Sausage Company
Bear Flag Fish Co.	LAVA Craft Cocktail Mixers	Santa Monica Seafood
Bluewater Grill	LCA Wine	Straub Distributing Company
Coastal Catering by Island Hotel	Maggiano’s South Coast Plaza	Sugar ‘n Spice Balboa Island Home of the Original Frozen Banana Since 1945
Cowgirl Winery	Mary & Dick Allen Diabetes Center Mobile Kitchen	The Bungalow Restaurant
Don Francisco’s Coffee	Muldoon’s Irish Pub	The Cannery
DP Catering	Newport Beach Firefighters	Turnip Rose Catering
El Cholo Corona del Mar	Newport Rib Company	Two Left Forks
Fig & Olive	Nothing Bundt Cakes of Costa Mesa	Waterline at Balboa Bay Resort
Fresh Brother	Olea Cellar. Craft. Cook.	Zotovitch Vineyards and Winery
Gabbi’s Mexican Kitchen		

Live entertainment by Jumping Jack Flash, known as the world’s greatest tribute to The Rolling Stones, got everyone on their feet to dance as the sun set. The grand prize raffle was a one-year lease of a new 2018 BMW X3 courtesy of Sterling BMW of Newport Beach.

We greatly appreciate our underwriters for their generosity and support of the 2018 Hoag Summer Fest.

2018
Hoag Fest



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

Dr. Fritz and Elaine Westerhout Have Made a Life Out of Giving Back

Retired Hoag physician Fritz Westerhout, M.D., clearly remembers his first date with wife Elaine. A native Southern Californian, he was a third-year medical student at Loma Linda University when he and Elaine were set up by friends. Elaine remembers her father opening the door and giving the future physician the once over. They married in 1958 and soon became the busy parents of three boys, one born at Hoag. They are proud that seven of their nine grandchildren were also born at Hoag.

When Dr. Westerhout joined the staff at Hoag in 1964, he and Elaine left Los Angeles for a small community that passionately supported its hospital. “Back then, the emergency room was in two trailers,” he remembers.

Dr. Westerhout joined the 552 Club and became the first physician to serve as president of the long-standing group. The couple served as Co-Chairs of the Christmas Carol Ball in 1974. Dr. Westerhout was president of the medical staff from 1990 to 1991 and served three terms on Hoag’s Board of Directors. Elaine was busy with their active boys while dedicating time to the music ministry at her church.

Healing Around the World

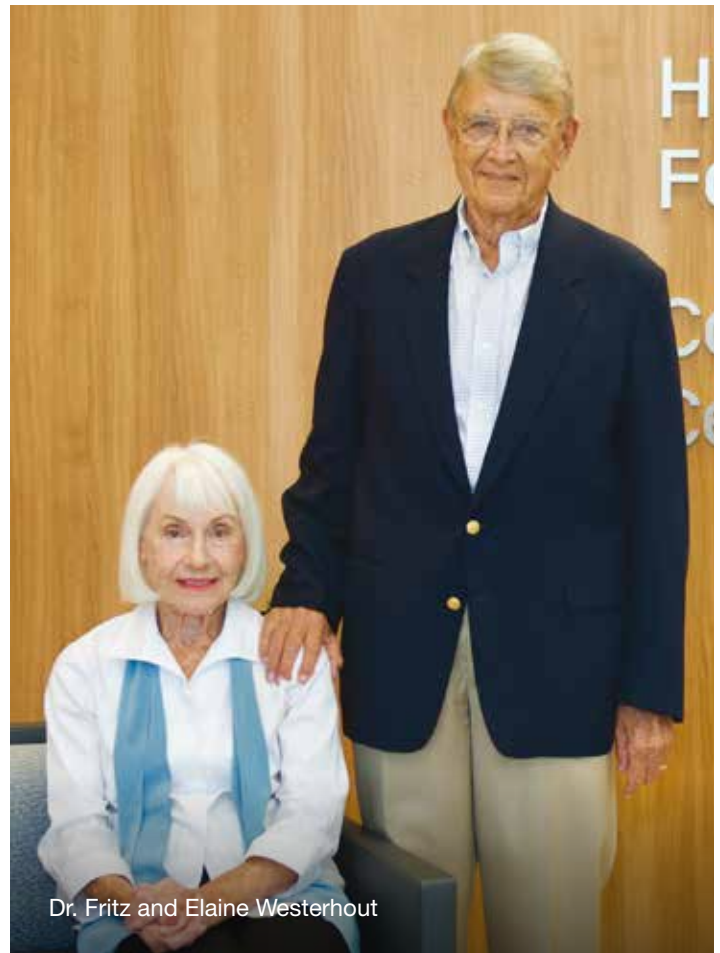
In 2000, Dr. Westerhout retired from Hoag, but he continued to practice medicine by taking mission trips to Africa with Elaine at his side. Elaine, who was born in a missionary community in the Democratic Republic of the Congo, felt that each of their four mission trips to Africa was a homecoming. She explored beyond the compound to meet the local villagers. She was often invited into their homes, a privilege and honor that she feels to this day.

During one of their missions, she had the opportunity to observe her husband at work. After 60 years of marriage, she had never seen this side of him. “I was in awe of what he was able to do,” she says, putting a smile on his face.

A Part of Something Special

Dr. Westerhout and Elaine know firsthand the value of community support. So it’s no surprise that they, like many retired and active Hoag physician families, are among Hoag’s most dedicated donors. Through their charitable bequest and many years of giving and volunteering, they are happy to give back to the community treasure that’s been here for them and their children and grandchildren.

The Westerhouts are grateful for the many years they have been able to have a part in making Hoag what it is today. “From way back when we first arrived in Newport Beach to now, when I look out from our porch and see Hoag dominating the skyline, it has been an honor to be part of that growth,” Elaine says.



Dr. Fritz and Elaine Westerhout

MESSAGE FROM THE PRESIDENT

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



At the 2018 Volunteer Summit, Hoag President and CEO Robert Braithwaite shared an exciting vision for Hoag's future that will only be possible with philanthropy. I'm proud to report our progress in raising \$562M of our \$627M Hoag Promise Campaign goal is laying the groundwork for Hoag's next decade and beyond.

In fact, a campaign like Hoag Promise continues to produce benefits far beyond its beginning and end dates. It provides a framework for what it will take to deliver world-class care by sharpening the focus on the vision and priorities. It creates a sense of urgency and consistency. And, it forever raises the giving levels, even after it's over. Because of this, Hoag leaders are able to dream bigger.

It also allows Hoag to bring programs to our community that are very unusual in the

community hospital setting such as our Endowed Chair Program. Thanks to our forward-thinking donors, Hoag is honored with 13 physicians holding Endowed Chairs to date. These Endowed Chairs, and the ones that follow, will allow future physician leaders to build on the work of current chair holders, which will benefit generations to come.

Long-time Hoag friends and philanthropists Jim and Martha Newkirk continued this tradition with the September Investiture of Anthony D. Caffarelli, M.D., as the Newkirk Family Endowed Chair in Aortic Care.

Since the launch of the Hoag Promise Campaign, I've been privileged to witness all but one Endowed Chair Investiture ceremony. I can't adequately describe the gravitas when Hoag physicians gather in a white coat processional to open an investiture. These awe-inspiring events are a fitting tribute to our

Endowed Chair donors, a truly special group of Hoag friends.

Among those friends are Ben and Carmela Du. In 2015, they made a gift to name Jeffrey S. Yoshida, M.D., the Benjamin & Carmela Du Endowed Chair in Urologic Oncology. This year, they gave another transformational gift. A few months ago, Ben joined us for a tour of the Hoag Irvine Emergency Pavilion construction site. He was particularly excited to learn of the innovations Hoag is making to better serve the community which inspired him and Carmela to make a \$5 million gift.

Thank you, Ben and Carmela, for your partnership with Hoag to provide the world's finest emergency care for our community. The Du and Newkirk families have established legacies that will touch countless patients, inspire others to give and remind us all of the power of philanthropy.

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All of us at Hoag Hospital Foundation wish you and your family
A Wonderful Holiday Season and a Healthy and Happy New Year!