

A Hoag Hospital Foundation Publication

SCANNER

SPRING EDITION

2018

Golf with a Purpose

2018 Toshiba Classic Thrills Fans While Benefitting Hoag and the Greater Community



2018 Toshiba Classic Champion, Vijay Singh

hoag
Hospital
Foundation

HOAG
PROMISE

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LETTER FROM THE CHAIR

Dear Friends of Hoag:

I'm pleased to have stepped into the role of Chair of the Hoag Hospital Foundation Board at an exciting but critical time as the Hoag Promise Campaign moves ever closer to the goal of \$627 million by December 31, 2020. By any measure, community support of the Hoag Promise Campaign to date has been extraordinary. However, our work is far from over. In many ways, it is just beginning. We now have an opportunity to drive innovation forward unlike any community hospital has ever done before.

Since the beginning, Hoag's culture of pioneering new approaches has been a big part of what drives our local and national reputation as a leader of exceptional care. Hoag has boldly introduced leading-edge technologies—many times being the first or only organization in the region to offer such advances. It has established partnerships to bring clinical research in heart and vascular, cancer and now diabetes to our community. And, it has recruited top-notch clinical and administrative leadership.

For our past and more recent successes, and for positioning Hoag at the forefront of advanced, compassionate health care, I am thankful to you. As Hoag's most dedicated supporters, you understand that innovation is rooted in the generosity of our community.

It's an honor to serve on the Hoag Hospital Foundation Board, populated by tremendously talented and dedicated volunteer leaders who have rallied around the idea of ensuring world-class health care here in Orange County. And, it's a privilege to serve you, our philanthropic community. I never forget that in my role as Chair, I'm partnering with Hoag leaders, donors and community members to shape Hoag's future.

I deeply appreciate your continued support and look forward to what we will accomplish together going forward.

Sincerely,



Robert Brunswick
Chair, Hoag Hospital Foundation Board



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COVER STORY



Golf with a Purpose

2018 Toshiba Classic Thrills Fans While Benefitting Hoag and the Greater Community

The Toshiba Classic made its highly anticipated return March 7 – 11, 2018, at Newport Beach Country Club. This year marked the 20-year anniversary of Hoag as the host and primary beneficiary.

The crowd enjoyed an exciting victory by 55-year-old World Golf Hall of Fame member Vijay Singh, a two-time PGA TOUR Champions winner.

This year, the Toshiba Classic raised more than \$1 million for a cumulative total of over \$20 million since 1998. Since 2011, proceeds from the event have benefitted the Mary & Dick Allen Diabetes Center at Hoag.

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



Tournament Week Highlights

- The 2018 Toshiba Classic week started with the Pro-Am tournaments, including the popular two-day Classic Pro-Am which consisted of 56 amateur teams who enjoyed golfing with the pros.
- World Golf Hall of Fame member and PGA TOUR legend Lanny Wadkins was the guest of honor at Breakfast with a Champion sponsored by Allergan.
- Military Appreciation Day was presented by Microsemi. In all, over 3,000 active and retired duty military members and their families enjoyed the day's activities while being honored for their brave service to our country. A portion of tournament proceeds were donated to the Open Hearts for Purple Hearts Foundation, Marine Corps Scholarship Fund and Navy Memorial Foundation.



TOSHIBA



PRESENTED BY
Kingston
TECHNOLOGY



CHAMPIONS



Birth of a Classic



The “Very” Early Days

Hoag Hospital 552 Club member Marshall Duffield was a USC quarterback on national championship teams from 1928 - 1930 where he was a teammate and fraternity brother of Marion Morrison, who became famous as John Wayne. John introduced Marshall to Bing Crosby and the two became friends and golf buddies. When Marshall learned Bing was interested in finding a place to hold a satellite tournament to his Pebble Beach Clambake Pro-Am, he suggested Newport Beach.

He enlisted his friend Charley Hester, another 552 Club member, to negotiate a deal for a tournament benefitting Hoag. Bing put up \$10,000 in prize money for the first tournament which was called the Crosby Southern Pro-Am. In 1993, Taco Bell took over as the title sponsor of the Pro-Am and the Taco Bell Newport Classic ran for five years.



Toshiba Comes on Board

In 1995, Toshiba became the title sponsor of a PGA Senior Tour Event, the Toshiba Senior Classic, held at the Mesa Verde Country Club in Costa Mesa. The charitable host of the Toshiba Senior Classic was Orange County Sports Authority.

While thrilled with Toshiba’s involvement with professional golf and the Champions Tour, Toshiba management wanted to significantly increase the charitable impact of the Toshiba Classic on the Newport Beach community. In 1998, Hoag became the operator and beneficiary of the Toshiba Classic which went on to become the most charitable tournament on the PGA TOUR Champions, raising more than a cumulative \$20 million for Hoag.



A New Chapter ... **A New Title Sponsor**

Hoag Charity Sports named longtime Orange County executive and philanthropist Paul Folino as chairman of the 2019 tournament, replacing Ira Garbutt, who filled the post for 10 years. During tournament week, Paul announced that Hoag is assuming the title sponsorship of Orange County's only PGA TOUR event and renaming it the Hoag Classic.

Hoag Charity Sports, a unit of Hoag Hospital Foundation, will continue to produce the event. Proceeds, which average \$1 million annually, will benefit Hoag.

Paul also announced that Konica Minolta is one of three new presenting sponsors, the first one announced to date. "Konica Minolta will provide both financial and corporate leadership which will help us

to deliver both charitable support and community impact while raising national awareness of Hoag," he said.

Rick Taylor, president and CEO of Konica Minolta, also a Hoag cancer survivor, shared: "When you work for a company that's very charitable and knows how to give back, that's a home run. But when you have a personal involvement, it's different and we'll do everything we can to uphold the tradition the founders have established."

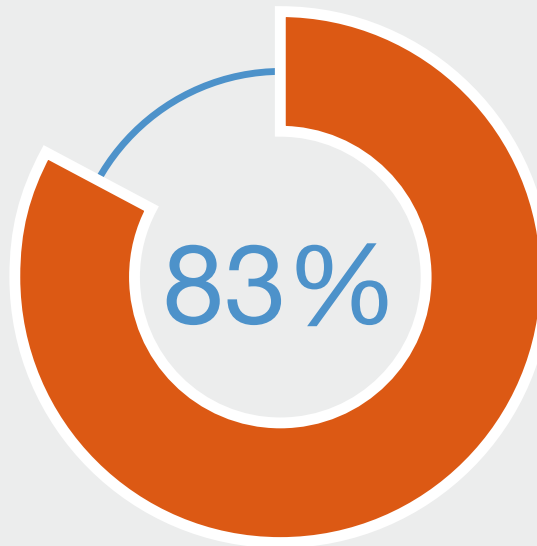
For more information on the Hoag Classic or becoming a presenting sponsor, please contact Jeff Purser at (949) 660-1001 or JPurser@hoagcharitysports.com.

HOAG PROMISE

Campaign Update

\$522M

RAISED TO DATE

**\$627M**

2020 CAMPAIGN GOAL

Campaign Duration: 2010 to 2020

Hoag Promise Fundraising Priority Spotlight:**ORGAN, EYE & TISSUE DONATION PROGRAM
Community Relations and Staff Education—\$50,000**

Hoag has a long-standing commitment to saving and improving lives through organ, eye and tissue donation. Although Hoag is not an organ transplant center, patients from Hoag Hospital Newport Beach, Hoag Hospital Irvine and Hoag Orthopedic Institute utilize donated tissues in a variety of ways including use of skin, bone, dura, tendon, cornea, heart valves and blood vessels.

Touching Patients in Critical Need of Organ Transplants

Currently, over 119,000 individuals in the U.S. are waiting to receive life-saving heart, liver, lung and kidney transplants. Through a partnership with OneLegacy, a nonprofit organ procurement organization, Hoag facilitates transplantation opportunities for patients wait-listed at regional transplant centers. Between 2006 and September

2017, Hoag had 97 organ donors and 379 tissue donors - the highest numbers for any non-trauma hospital in Orange County.

Donor support will help raise the visibility and awareness for the Hoag Organ, Eye and Tissue Donation Program and help us touch patients across the nation who are in critical and immediate need of transplants. Philanthropy plays an important role in community education and educating staff and patients on the importance of organ, eye and tissue donation in our community and beyond.

If you would like to support the Hoag Organ, Eye and Tissue Donation Program, please contact Angela Gomez at (949) 764-7222 or Angela.Gomez@hoag.org.

IN MEMORIAM

Tribute to a Hoag Icon

Celebrating the Life of Nora Jorgensen

Nora Jorgensen sparkled. Anyone who had the pleasure of meeting her never forgot the twinkle in her blue eyes, the genuine warmth of her smile or her lively spirit. Famous for spontaneously breaking into song, Nora never left the house without her trademark glamour or her keen sense of humor.

Born in Salina, Kansas, in 1927, Nora and her twin sister Norma Jean were tragically orphaned at the age of 12. Raised by a nanny, Nora's abiding faith, which she expressed through her beautiful singing voice, carried her through her heartbreak. Nora attended St. Mary's College where she further developed her musical ability.

She married at age 19 and had two children, Mary Grace and David Geoffroy. After one particularly devastating tornado, her children remember leaving Kansas for California in a pink Cadillac. Nora settled into her new life in Newport Beach where she began volunteering at Hoag Hospital Newport Beach as a greeter and candy striper.

As a newly single mother, Nora had many suitors. Her children rooted for a gentleman who invented frozen bananas! But, one fateful evening, she met Alfred Vincent (Vin) Jorgensen who was then president of Balboa Marine Hardware Company and Chair of the Hoag Board. It was love at first sight. He told her he would marry her on their first date. She crisply replied, "We will see about that."

Vin was right, and they married in 1960.

Together, Nora and Vin dedicated themselves to supporting Hoag. For all but one Christmas Carol Ball, she led the invocation, demonstrating her love of Hoag and its physicians and nurses. After Vin passed away in 1988, Nora continued in her passion for Hoag and the greater community. She married Jim Johnson and for twenty years they traveled the world until he passed away in 2015.

Nora touched lives through her generous volunteerism and contributions as a founding member of Circle 1000. A tireless Hoag booster, she was a fixture at nearly all of Hoag's historic milestones and events over the past 50 years. In addition to Hoag, Nora played important roles in many community organizations.

At Hoag, we will remember how Nora was always thrilled to see and chat with every person she met—strangers as well as old friends. Our lives are a little brighter for having known and loved her.



Nora and Vin Jorgensen



Hands-on Philanthropy

Philanthropists Debbie and Jeff Margolis Have Made Giving Back Their Vocation

When you sit down with Debbie and Jeff Margolis, you walk away feeling inspired by their commitment to philanthropy as a lifestyle and by their 30-plus-year love story.

As rivals in the jazz band, the competing guitarists didn't start out as "sweethearts" at their Boulder, Colorado, high school. Senior Debbie held a coveted spot in the band that Jeff, then a junior, wanted. But things changed when she asked him to the senior dance. From the moment he said yes, they formed a bond that's unified them through the joys of marriage and parenthood as well as unforeseen hardships.

While Jeff and Debbie have enjoyed many blessings, the couple's life together has been shadowed by chronic illness. At the age of 19, Jeff was diagnosed with Crohn's disease. He's suffered flare-ups over the years and endured seven surgeries. At one point early on, he was so gravely ill that he nearly slipped away, but his determined physicians pulled him through. As young parents coping with Jeff's condition, the couple's experience was made more difficult by the inefficiencies of the health care system.

DONOR PROFILE

Rising to the Challenge

In 1997, inspired by the frustration he and Debbie had faced, Jeff started TriZetto Group to improve health care efficiency through enterprise software that automates benefits administration and provider payments.

What began as a start-up in their home quickly grew to nearly \$550 million in revenue. TriZetto was traded on NASDAQ until August of 2008 when it was taken private. Jeff is chairman and CEO of Welltok, Inc., creator of the CaféWell® Health Optimization Platform. He's also chairman emeritus of TriZetto Corporation and serves on boards of several other health care technology companies.

For her part, Debbie, a teacher by training, devoted her time to raising the couple's daughters, Alexandria and Allegra. As the girls grew, Debbie turned her focus to community service. Both Jeff and Debbie are very active as volunteer leaders on non-profit boards for organizations which they philanthropically support. Jeff serves on the Hoag Board of Directors and is past director of the National Board for the Crohn's and Colitis Foundation among others.

A natural leader and talented fundraiser, Debbie currently serves as a Director on the Hoag Hospital Foundation Board as well as the chair of multiple committees for other nonprofits. She was honored with the 2014 Woman of the Year award by the Women's Philanthropy Board of Jewish Federation and Family Services, an organization for which she served as Chair of the Board.

"We're really hands-on philanthropists with a passion for it," shares Debbie. "For us, serving on a committee or on a board allows us to be part of the process of guiding organizations toward their goals and, in turn, helping to fund them."

Philanthropic Way of Life

For Jeff, his interest in philanthropy started when, as a child, he noticed envelopes stacked on his

grandfather's desk, each filled with small amounts of cash. "He was not a wealthy man, but he always gave," Jeff remembers. When Jeff finally asked him why he gave away money, his grandfather replied, "If they didn't need it, they wouldn't ask."

Debbie remembers walking for the March of Dimes with her mom who would always jump in and help when she could. "Mom never said 'no' to a bake sale," she says.

They have also instilled the value of giving and service in their daughters, who, since age 18, have sat on the board of their family foundation. "They're part of our ongoing conversation of how to be philanthropic," Debbie says.

When the couple learned about Hoag's emerging digestive health programs, they saw an opportunity to make a lasting impact for patients and families who live with inflammatory bowel diseases. In recognition of their \$1 million gift, Hoag named the Margolis Family Inflammatory Bowel Disease Program.

For Jeff and Debbie, whose lives have been shaped by his struggle with Crohn's disease, this gift is very personal and very practical.

"If we're to leave one thing in Orange County, we envision a center of excellence where people who are suffering can get well and get the support they need," Debbie says. "We would love for Hoag to be that place for Southern California."

"When you get hit with something challenging, you can be a victim, or you can stand up and do something about it."

~Jeff Margolis

EVENTS



Hoag Heritage Society Enjoys a Literary Luncheon

The Hoag Hospital Foundation honored nearly 200 philanthropists at its 24th annual Hoag Heritage Society Luncheon on February 6th at the Balboa Bay Resort in Newport Beach. The literary-themed event honored Hoag Benefactor, grateful patient and international bestselling author Dean Koontz.

During his remarks, Dean lauded Hoag Emergency Department and Intensive Care Unit nurses and physicians who saved his life after he collapsed from a bleeding ulcer. With humor, he regaled the audience with stories of his and wife Gerda's adventures. "Because of Hoag and the doctors and nurses working there, I lost half my blood but not my life," he said. "Hoag is not just a hospital. It is a treasure. Hoag is where the best and brightest save lives every day."

To the delight of the crowd, Dean shared that he and Gerda named Hoag as a beneficiary of their estate. "When we give to Hoag, we are giving to our neighbors, our community and to future generations," he said.

Heritage Society Donors Key to Hoag Promise Campaign Success

Flynn A. Andrizzi, Ph.D., president, Hoag Hospital Foundation, shared that Planned Giving donors, those who include Hoag in their estate plans, account for a significant portion of the funds raised during the Hoag Promise Campaign. He cited Dr. Rudolph and Dorothy Baldoni, Hans and Laura Wang and the late Margaret Weimar as three examples of the many ways donors can use planned giving to support Hoag while also meeting their personal financial goals.

"Thanks to you, our generous community of donors, we came out of a record-breaking fundraising year which brought us to the \$500 million mark right at the end of the year," he said. "Today, we stand at \$519 million on the way to our Campaign goal of \$627 million by the end of 2020."

Executive Director of Gift Planning Julie Heggeness, JD, CSPG, TEP, acknowledged



members of the Planned Giving Advisory Committee, a group of professionals who volunteer their service to assist the Foundation in educating community members interested in making planned gifts. She also thanked Heritage Society members for their generosity.

“We are excited to welcome many new members and I look forward to hearing all of your Hoag stories,” said Julie. “The best part of my job is learning about your connections to Hoag and how much it means to you and your families.”

The program also included a welcome message from Mark A. Hardtke, member of the Planned

Giving Advisory Committee and a Director of the Hoag Hospital Foundation Board, an update on the state of Hoag by Michael Ricks, Hoag executive vice president and chief operating officer, as well as an inspiring invocation by Rev. Don Oliver, Ph.D., chaplain director of Pastoral Care at 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 the Hoag Heritage Society, please contact Julie Heggeness, JD, CSPG, TEP, at (949) 764-7206 or Julie.Heggeness@hoag.org.

BENEFACTOR SPOTLIGHT

Orthopedic Pioneer

Supports Future Innovation

Dr. Earl Feiwell and wife Shirley were both knee replacement patients under the care of Robert S. Gorab, M.D., chief medical officer, Hoag Orthopedic Institute (HOI). But, their connection to Dr. Gorab and the clinicians at Hoag Orthopedic Institute is deeply rooted. An orthopedic surgeon and educator, Dr. Feiwell was an instructor during training for Dr. Gorab as well as Carlos Prietto, M.D., executive director of Hoag Orthopedics and Miguel Prietto, M.D., partner and brother to Dr. Carlos Prietto.



Shirley taught elementary school before they welcomed their three children.

While Shirley is modest about talking about her teaching career, Dr. Feiwell proudly shared how she took it upon herself to rewrite textbooks, mentor her fellow teachers and hold study sessions for her students during recess and after school. As she dedicated herself to raising their family, she volunteered in the schools and tutored children in their neighborhood.

Grateful Benefactors

While they were happy to be around so many old friends, the couple was profoundly affected by the entire experience at Hoag. “We were both impressed with how everything was arranged and worked efficiently,” said Dr. Feiwell. “We never doubted that everything happened the way it should.”

A Front Row Seat to Progress

In the early days of Dr. Feiwell’s career, he entered orthopedics working with polio and spina bifida patients at his Long Beach practice and at Rancho Los Amigos Rehabilitation Center. The procedures and technology we take for granted today were mere ideas at that time.

Dr. Feiwell’s practice was one of the first to offer total hip replacement and use clean rooms. “Ninety-five percent of the surgeries I was doing at the end of my career were not even possibilities when I was in training,” he says.

After their great patient experiences at Hoag, the Feiwells went right back to tennis and traveling the world. They also became excited by new developments in treatment such as outpatient knee replacement and the research underway by fellows and orthopedic surgeons at Hoag Orthopedics. They became Hoag Benefactors with a gift that supports orthopedic research and education.

After attending the most recent Hoag Orthopedics Fellowship Research Day, during which fellows shared case presentations from the past academic year, Shirley was very impressed with the advancements happening right here at Hoag. “If you want to see progress, you must support it,” she says.

To join Dr. and Mrs. Feiwell in support of education, research and innovation at Hoag Orthopedics, please contact C.C. Hafner, director of Major Gifts, at CC.Hafner@hoag.org or (949) 557-0246.

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

MESSAGE FROM THE PRESIDENT

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



Hoag Promise Campaign Hits a Major Milestone

Thanks to the extraordinary generosity of our donor community, we started 2018 having reached \$500 million toward our Hoag Promise Campaign goal of \$627 million by December 31, 2020. As we begin to approach the home stretch, we celebrate Hoag's philanthropy-driven strides and share a few examples of the many important initiatives made possible by your support.

Historically associated with academic institutions, Hoag now has 13 Endowed Chairs that allow clinical leaders to expand and improve programs in cancer, cardiac care, memory loss and cognitive impairment, neurosciences, diabetes, breast care, orthopedics and women's health.

Thanks to Julia and George Argyros, who established the Julia Argyros Center for Nursing Excellence, and donors such as

the Crean Foundation and many others, Hoag nurses are earning scholarships in record numbers. Donors have funded more than 1,900 nursing scholarships and raised our percentage of nurses with a BSN or higher to 74%.

Because of donor support, Hoag has been the first hospital in the region to acquire leading-edge technology. Our newest donor-funded advance, a robotic surgical device, allows minimally invasive interventional cardiology procedures with precise control and minimal radiation exposure to patients, physicians and nurses.

Let's not forget that Hoag is the place where many of our children and grandchildren are born. I once heard Allyson Brooks, M.D., Ginny Ueberroth Executive Medical Director Endowed Chair, Women's Health Institute and Hoag chief quality officer, say that every day Hoag fills up a kindergarten class with the number of new babies

delivered here. Through donor supported improvements at Hoag NICU and training for OB physician and nurse teams, Hoag babies get the best possible start in life.

I could continue, but I urge you to spend some time at HoagPromise.org and read through our FY17 Donor Impact Reports. The stories are inspiring and we have our growing community of philanthropists to thank for them.

Remembering Nora

I would like to pay tribute to Nora Jorgensen who we lost in January. Nora was very special to Hoag, Hoag Hospital Foundation and to our donor community. We enjoyed hearing her stories about her long history with Hoag and her presence at Foundation events was always a real treat. Hoag and our community benefitted greatly from Nora's enthusiasm and passion for service. She is greatly missed.

Hoag Hospital Foundation
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A graphic for the Hoag Summer Fest 2018. It features a blue sky with a white sunburst and the year "2018" in the center. Two red birds are flying on either side. Below the sky, there are silhouettes of palm trees and a crowd of people with their arms raised. A Ferris wheel is visible in the background.

Hoag Summer Fest

Wednesday, June 27, 2018
5:00 p.m.

Newport Dunes
1131 Back Bay Drive
Newport Beach

Tastings from more than 40 of
Orange County's finest restaurants

Live Entertainment featuring Jumping Jack Flash
A tribute to the Rolling Stones

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

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

