

HOAG HOSPITAL FOUNDATION in support of Hoag

# Scanner

## 2012 Movie Screening Event **A Big Hit!**

**DONOR PROFILE:**  
Artist Donates Major  
Sculpture to Hoag

**VOLUNTEER TRIBUTE:**  
2012 Vin Jorgensen Award Winners

*Jim and Patti Edwards with Mark Hardtke at the 2012 Hoag Movie Screening*

Dear Friends of Hoag:

As we approach the end of Hoag's fiscal year on September 30, I'm reflecting on my first year as the Chair of the Hoag Hospital Foundation Board and the tremendous accomplishments we've achieved together. Thanks to all of you, Hoag Hospital Foundation is closing in on its FY 2012 fundraising goal of \$40 million. For that we are very grateful!

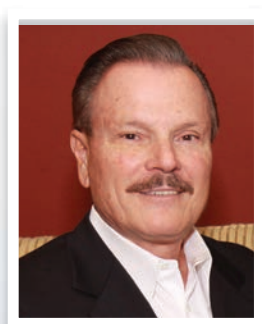
We know this is a time of great change in healthcare. As I write this letter, Hoag is announcing a historic affiliation with St. Joseph Health that will allow both organizations to better meet the needs of the Orange County community. We also know that philanthropy will be even more important as Hoag continues to enhance the best of what it does today while it anticipates and prepares for the next generation of healthcare delivery. With that in mind, the Hoag Hospital Foundation has significantly ramped up over the past 18 months to support Hoag in meeting the challenges of transforming healthcare.

I'm very pleased with the caliber of the Foundation staff and the direction it's taking. With the support of our Board, the Foundation team is maximizing the strategic growth of its development and stewardship operations and employing fundraising best practices from successful hospitals and major universities. This is resulting in a deepening and strengthening of the mutually beneficial partnership between Hoag and the communities it serves.

I'm extremely gratified by the passionate and steadfast community support for Hoag. At the end of the day, the Foundation is an instrument of the community. It's the conduit through which you make your wishes known about the kind of healthcare you expect from Hoag. That's why the Foundation's fundraising successes are, in a very real way, your fundraising successes.

As we face the future together, the results of the three-way collaboration between Hoag, Hoag Hospital Foundation and the communities we serve will reflect our combined intention for excellence. Thank you for your continuing participation and support of exceptional care.

Please enjoy this edition of *Scanner* with my best wishes.



Sincerely,

A handwritten signature in black ink, appearing to read 'Jim Coufos', written over a light blue background.

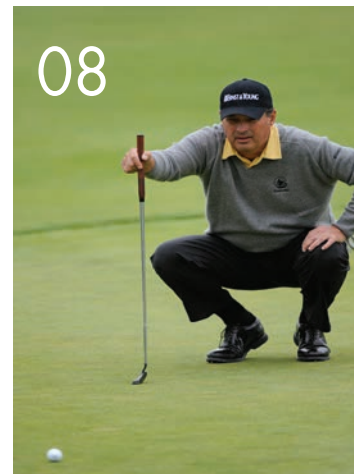
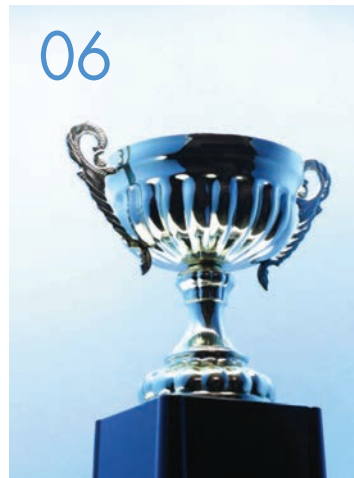
Jim Coufos  
Chair

Hoag Hospital Foundation Board



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SCANNER FALL 2012



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# 2012

## Movie Screening Event

# A Big Hit!



## 32 Restaurants and 1,200 supporters raised \$216K for Hoag

The Hoag Hospital Foundation 552 Club announced that this year's Movie Screening raised approximately \$216K for Hoag Hospital Newport Beach and Hoag Hospital Irvine. More than 1,200 guests gathered to enjoy one of the summer's most eagerly anticipated events, featuring 32 of Orange County's finest restaurants at Big Newport Edwards Theatre.

"The Hoag Movie Screening is one of my favorite events of the year," says Mark Hardtke, chair of the event. "We enjoy meeting with friends, trying some great food and a movie while raising awareness and support for Hoag."

This year the Allen Diabetes Center's Herbert Family Program made a generous donation to allow young adults with Type 1 Diabetes the opportunity to attend this special evening. "Hoag is a world-class healthcare system and we're excited to treat our young patients to a special evening," says Lauri Herbert Delson, whose gift made the program possible. "But even more importantly, we are bringing them to this event so they can actively raise awareness of Type 1 Diabetes and join the Hoag community of friends and supporters."

The main event was a private screening of *The Bourne Legacy* starring

Jeremy Renner, Edward Norton, Rachel Weisz, Joan Allen and Albert Finney. More photos from the event are available at <http://www.hoagmoviescreening.org>.

For more information about attending or supporting an upcoming Hoag event, please contact Stacy Hunt at (949) 764-7205 or [stacy.hunt@hoag.org](mailto:stacy.hunt@hoag.org).





Bradley Schmitt, Ilona Martin, Trudi Bonnet, Gina Cereda and Emily Hung



Lauren Franke, Steve Delson and  
Lauri Herbert Delson



Amanda and Bob Hogan

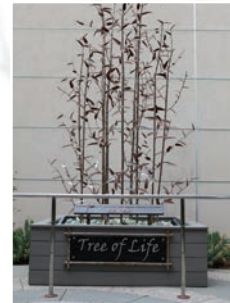


Ilona Martin and Sindi Schwartz



Guests enjoying the great food!





# Honoring The Ultimate Gift

## Artist Donates Major Sculpture to Hoag in Recognition of Organ and Tissue Donors

In a quiet space, located just off the patio of the Fimiano Emergency Pavilion at Hoag Hospital Newport Beach, stands a beautiful remembrance of Hoag patients who've donated their organs to save the lives of others. Flanked by benches, the stainless steel and bronze "Tree of Life" invites contemplation and reflection. Designed and donated to Hoag by renowned artist Tova Rotlevy-Cohen, the 14-foot bamboo tree sculpture, with leaves bearing the names of organ donors, is a quiet testimony to one of the most precious gifts that one human being can give to another.

The Tree of Life tribute is unique to Orange County and Hoag is a fitting site for it. Between 2006 and 2011, Hoag had the largest number of tissue donors of any hospital in Orange County, with 138 consented donors. It also had 29 consented organ donors in the same time period, the largest of any non-trauma hospital in Orange County.

## Taking Inspired Action

The Tree of Life was the brainchild of Rosemary O'meeghan, M.D., then chair of Hoag's Critical Care Department. While attending a medical conference, Dr. O'meeghan saw examples of what hospitals around the country were doing to honor their organ and tissue donors. In her job as a Hoag Intensivist, a specialist that provides critical care, she is often on the scene when families make the decision to donate the organs and tissues of a loved one. She immediately resonated with the idea of creating a tribute to the courage, dignity and enormous generosity of these donors and their families.

Thinking that Tova, her long-time neighbor and friend, could advise her on how to go about creating a Tree of Life for Hoag, she was delighted when Tova not only embraced the idea but wholeheartedly agreed to donate the sculpture. Hoag President and CEO, Richard Afable, M.D., was very supportive of the project and thus began a two-year journey that culminated in a dedication ceremony in September 2011.

"The Tree of Life is an expression of the gratitude and admiration that I and my colleagues at Hoag feel for donors and their families," shares Dr. O'meeghan. "It also serves to raise awareness about the incredible gift of organ and tissue donation."

## Designing from the Heart

Forty-five years ago, Tova had a very personal experience with biological donation when her beloved three-year-old daughter passed away from a rare pediatric heart problem. Broken hearted but deeply grateful that doctors were able to give her three years with Sigal, Tova "gave her back to medicine" in the hope that what they learned would save other children. "When Rosemary came to me with the project I said, 'God sent you,'" explains Tova. "It was my privilege to donate my work to a wonderful cause and to honor my sweet Sigal."

Tova reflects that her sculptures are usually very strong emotional statements. She hopes that passersby will walk away with the thought that they can contribute to the lives of others. Tova and Dr. O'meeghan worked closely to complete the project. "I want to make sure that people understand the enormity of Tova's gift and her generosity," smiles Dr. O'meeghan. "This was a huge undertaking that took her hundreds of hours from design, working with the architects, fabricators, gardeners, metal workers and others on every detail. This was a very important project to me personally, and I'm so grateful for what she's done."

Mother to two adult children and grandmother to four, Tova recently lost Max, her dear husband of forty-two years who was also her best friend. An artist since childhood, she was born in Poland and grew up in Israel from the age of four. In 1975, she immigrated to the U.S. and today works from her Newport Beach studio. Tova's sculptures can be found in Israel, Austria, Norway, Panama and California.

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For information about ways to support Hoag, please contact Hoag Hospital Foundation at (949) 764-7217 or visit us on the web at [www.hoaghospitalfoundation.com](http://www.hoaghospitalfoundation.com). ■



Dr. Rosemary O'meeghan  
and Tova Rotlevy-Cohen

# Book of Life

*"What you leave behind is not what is engraved in stone monuments, but what is woven into the lives of others."*  
—Pericles

While the Tree of Life commemorates and recognizes organ donors (hearts, lungs, livers, kidneys), the Book of Life, located at the entrance to the Maseeh Chapel at Hoag Hospital Newport Beach, honors tissue donors as well. Designed by Tova as part of the Tree of Life project, the Book of Life rests on a gorgeous plexiglass pedestal donated by One Legacy. It lists all Hoag organ and tissue donors, whose families have given permission, starting from mid-2006.

"Tova and I wanted to make sure that tissue donors were also remembered and recognized," says Dr. O'meeghan. "Hoag is not an organ transplant center but our patients do utilize donated tissues such skin, bone, tendons and heart valves." ■



# Congratulations!

Each year Hoag Hospital Foundation honors those whose volunteer service is outstanding and deserving of special recognition. Please join us in congratulating our 2012 award winners!

## Vin Jorgensen Award Winners:



### Hoag Hospital Foundation Board Sandi Simon

A long-time volunteer leader, Sandi Simon has served on the boards of many non-profit organizations over the course of her life. A committed ambassador for Hoag, she's been a member of the Hoag Hospital Foundation Board for the past seven years. One highlight among her many contributions as a board member is her championship of the Hoag Hospital Foundation Benefactor Program. She was a catalyst for growing and enhancing the program which she believes is an important donor recognition tool. She and husband, Ron Simon, are honorary co-chairs of the annual Hoag Hospital Foundation Christmas Carol Ball, and for the past three years they opened their home to host an underwriter's dinner for that event.



### 552 Club Lisa Karamardian, M.D.

A four-year member of the 552 Club, Lisa Karamardian, M.D., is a tremendous asset to Hoag as a physician and a volunteer leader. The generosity demonstrated by the community in building the Sue & Bill Gross Women's Pavilion inspired Dr. Karamardian to get involved with the 552 Club. As a practicing physician she has a deep appreciation for what the support of an engaged philanthropic community allows her to do for her patients. She believes physician participation in the 552 Club is important to more closely link donors with Hoag in service to better meeting the needs of patients through fundraising. Dr. Karamardian and her husband, Vahe, have served as co-chairs of the Christmas Carol Ball for three years and this year are honorary co-chairs of the event. Dr. Karamardian has also served Hoag as chair of the Department of Obstetrics & Gynecology, a member of Hoag's Continuum of Care & Clinical IT task forces and a physician champion for women's health issues.



### Circle 1000 Lin Auer

A Circle 1000 committee member for nearly 20 years, Lin Auer believes strongly in giving back. Her devotion to service honors her late husband Al Auer and his legacy of supporting Hoag, both financially and through his service on the Board of Directors for more than 30 years. In addition to her work with Circle 1000, Lin previously served six years on the 552 Club board and seven years on the Alzheimer's Family Services board. She's served on the 552 Club Movie Screening committee, Christmas Carol Ball committee and the Women's Pavilion committee. She recently joined the Hoag Neurosciences Institute Advisory committee. Lin is grateful to be of service through Hoag and Circle 1000, not only for the opportunity to impact lives, but also for the deep friendships she's built with fellow volunteers.



### Hoag Auxiliary Ruth Poole

Hoag Auxiliary President and CEO since 2010, Ruth Poole has been volunteering at Hoag for 34 years. In her role as President, Ruth conducts monthly Board meetings, attends volunteer orientation meetings and manages the activities of the Auxiliary. A retired high school English teacher, Ruth combined her love of reading and her joy in helping people in her long-time role as a book cart volunteer. She loves visiting with patients and sharing books and magazines to brighten their stay at Hoag. Over the years, Ruth has served on the Auxiliary Board as the Vice President of Programs and as the Corresponding Secretary. Ruth believes Hoag is a very special place with a wonderful culture and has enjoyed watching it grow and change. She reminds us that all books and magazines on the book carts are donations and that the Auxiliary gratefully accepts gently used reading material.





### **Pete Siracusa Award Winner** **Kyle Wescoat**

The Pete Siracusa Award is presented to 552 Club members in good standing, not currently serving on the 552 Club Board, who continue to make significant contributions.

Kyle Wescoat, former member of the 552 Club board, is a passionate volunteer and advocate for Hoag. Long-time community volunteer for Big Brothers, Kyle joined the 552 Club Board after a friend recommended he become involved. With a strong interest in issues that are top-of-mind for business, Kyle developed the idea for the inaugural Forum on Healthcare, presented by the Hoag Hospital Foundation in 2011. Chair of the Forum on Healthcare committee for 2011 and 2012, Kyle has been fully involved in all of the Forum logistics and has been instrumental in securing sponsorships. Kyle, who shares that he enjoys working with Hoag volunteers and staff, also serves on the Hoag Hospital Irvine Advisory Board.



### **President's Circle Award Winners** **Jim and Patti Edwards**

The 552 President's Circle Award honors individuals who are active members of the 552 Club and who, over a long

period of time, have made valuable contributions of time, talent and treasure to Hoag and to the community.

Long-time volunteers and friends of Hoag, Patti and Jim Edwards have always believed that it's very important to give back. When Jim joined the 552 Club in the mid-1980s, the couple became involved with committees for various events such as the Christmas Carol Ball and the Sweetheart Ball. But, their signature event for the past three-plus decades has been the Hoag Movie Screening. For 23 years, as owners of the Big Newport Theatre, the Edwards generously loaned the use of the theatre and parking lot to Hoag for this summertime favorite. After they sold it to Regal Entertainment in 2001, they continued to act as the liaison to secure use of the property for Hoag. The couple enjoys the teamwork involved in putting on a great event to support a wonderful community asset.

### **Corporate Partnership Award Winner** **Tiffany & Co.**

The 552 Club Corporate Partner Award recognizes a business that has been generous in supporting 552 Club events and that participates as an ambassador for Hoag in the community.

The 552 Club is pleased to honor Tiffany & Co. of South Coast Plaza with the 2012 Corporate Partnership Award. Celebrating its 175th anniversary, Tiffany & Co. is synonymous with style, quality and luxury. Since its opening in 1988, Tiffany & Co. of South Coast Plaza has been a Hoag booster and supporter. In 2011, the company was the signature donor for the Christmas Carol Ball donating gorgeous diamond jewelry and a "Breakfast at Tiffanys" experience for the auction as well as crystal platter table gifts for the guests. Tiffany & Co. Group Director, Michael Botsko, shares that the organization values its long-standing relationship with Hoag.



# Par Excellence!

## 2012 Toshiba Classic Proceeds Benefit the Mary & Dick Allen Diabetes Center at Hoag

For the second consecutive year, over \$1 million in proceeds from the Toshiba Classic benefited the Mary & Dick Allen Diabetes Center at Hoag, which provides comprehensive services to those with, or at risk for diabetes regardless of their ability to pay. Long hailed as the benchmark for charitable giving on the PGA tour, the Toshiba Classic has generated more than \$15 million dollars to benefit Hoag throughout its 15-year history.

Fans filled the galleries and braved less-than-perfect weather in return for spectacular golf throughout the week of March 12 - 18. Despite contending with severe winds, Loren Roberts

birdied the final hole to win the tournament by two strokes.

"The Toshiba Classic is 'win' for our community," says Jeff Purser, executive tournament director. "Not only do we get to enjoy world-class golf and bring millions of dollars into the local economy, we are able to raise a significant amount to support the Allen Diabetes Center."



### Highlights from the tournament include:

- **The Toshiba Scholarship Fund** selected two top local students; Drew Gleason, Mission Viejo High School and Paul Tadross, Newport Harbor High School to receive \$10,000 scholarships and Toshiba notebook computers. Ten finalists also received Toshiba notebook computers.
- **The Toshiba "Swing for the Green" Recycling Event** collected thousands of pounds of electronic products from tournament spectators for recycling.
- **The Breakfast with a Champion**, presented by Allergan Foundation, is a highlight of the Toshiba Classic tournament week. This year's featured speaker was World Golf Hall of Famer and all-time leading money winner in the Champion Tour, Hale Irwin.





2012 Toshiba Classic winner,  
Loren Roberts

**TOSHIBA**







# Well Done!

## Circle 1000 Celebrates 25 Years and Raises More than \$1 Million

Circle 1000's 25th anniversary brunch, held this year on April 25, was a memorable and meaningful tribute to a quarter century of giving by an extraordinary group of donors. There were many wonderful moments at the event and none was more striking than the traditional recognition of cancer survivors as they stood in quiet testimony to the impact of, and continued need for, the work done by Circle 1000.

To commemorate its silver anniversary, Circle 1000 brought back a past favorite speaker, Alan Hobson, a noted author, Mt. Everest summiteer and two-time cancer survivor. Alan spoke of his gratitude for being back home with his Circle 1000 family as

he shared his "CAN-WILL" message and his extraordinary climb back from cancer. Special surprise guest, Taylor Carol, a 17-year-old singer, songwriter and performer, who's also a survivor of a rare form of pediatric cancer, thrilled the audience with his stirring performance of *The Impossible Dream*.

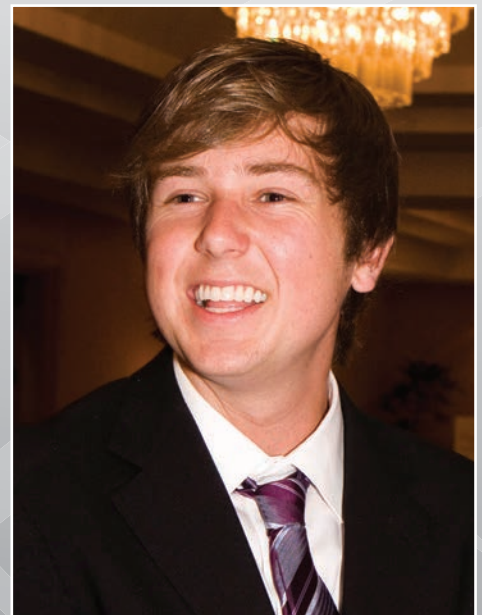
For the past 25 years, Circle 1000 has had a profound impact on Hoag Family Cancer Institute's ability to provide our community with the finest physicians, nurses and staff equipped with the latest technology and treatments available. The group raised more than \$1M this year for a total of \$13.4M in its 25-year history. ■



Pamela Schmider & Alan Hobson



Sandy Sewell



Taylor Carol





*Ilona Martin, Al Schulten, Jr. & Al Schulten*



*Terry & Sharon Bridges*



*John Pitchess*



# Everyone's a Star!

## The "Oscars" Theme Lends a Glamorous Touch to the Hoag Heritage Society 18th Annual Luncheon

More than 120 members of the Hoag Heritage Society gathered at the Turnip Rose in February for the 18th annual luncheon recognizing those who have made gifts to Hoag through a bequest, charitable trust or gift annuity. The luncheon featured an "Oscars" theme that included a very special opportunity for guests to be photographed with an authentic Oscar, graciously loaned to Hoag Hospital Foundation for the event by one of Hoag's Heritage Society members.

"We appreciate and honor our Heritage Society members, and the luncheon is our opportunity to express our sincere gratitude for their support," says Sharon Thornton, JD, LL.M, Vice President, Gift Planning. "Their legacy of generosity will touch lives for generations to come."

For more information about the Hoag Heritage Society, please contact Sharon Thornton at (949) 764-7206 or [sharon.thornton@hoag.org](mailto:sharon.thornton@hoag.org). ■

# Funding the Future

## Two Hoag Clinical Leaders Named New Endowed Chairs in Investiture Ceremony

In May of this year, Flynn A. Andrizzi, Ph.D., president of the Hoag Hospital Foundation, welcomed guests to a formal Endowed Chair Investiture ceremony to recognize Hoag's latest endowed chair recipients:

- **Dipti Itchhaporia, M.D., F.A.C.C.**, medical director of Disease Management for Hoag Heart & Vascular Institute and the new Robert & Georgia Roth Endowed Chair for Excellence in Cardiac Care
- **William Rodman Shankle, M.S., M.D., F.A.C.P.**, director of the Orange County Vital Aging Program at Hoag Neurosciences Institute and the new Judy & Richard Voltmer Endowed Chair in Memory Loss and Cognitive Disorders

Endowed Chairs are one of the most prestigious honors that can be bestowed on a physician and they come with very high expectations. In addition to acting as leaders among their peers, endowed chair holders must stay current with the latest advances in their fields and encourage and participate in clinical research and other academic pursuits. They must understand the needs of patients from an organizational perspective and act as leaders of care in addition to providers of care.

These are lofty goals and our clinical leaders are meeting them thanks to the generous support of our donors. "We are very grateful to Judy and Richard Voltmer and Robert and Georgia Roth for their vision and generosity in allowing Hoag to create these two important new endowed chairs," says Flynn. "The benefits of endowed chairs are exponential. They enhance the reputation of an organization which serves to draw and attract other renowned clinicians and staff, and they provide financial resources for the physician leader holding the chair to advance his or her clinical specialty." ■



*Dr. William Shankle, Judy & Richard Voltmer*



*Dr. Dipti Itchhaporia, Georgia & Robert Roth*





## Named Strategic Funds

# A New Way of Giving

Hoag Hospital Foundation has created a new set of named strategic funds that offer donors the opportunity to support specific areas of interest in important ways aside from facilities and equipment. At donation levels starting at minimums of \$50,000 to \$250,000, named funds are designed to support programs that promote excellence, research, innovation and education in the Hoag Institute or Center that most interests the donor. All expenditures from a named Fund, and the corresponding impact, are reported back to the donor.

New Hoag Benefactors, and one of the first to name a fund, Steve and Kathy Prough were excited to establish the Kathleen & Stephen Prough Excellence Fund. “Kathy and I are very impressed with the way the Foundation is treating these new named strategic funds like a business might treat venture funds,” shares Steve. “Hoag’s medical leaders are able to use the funds as they see fit but the Foundation will report back to us regarding the specific use of the Prough Excellence Fund and how our gift has made an impact on care at Hoag. Knowing our ‘return on investment’ will make the gift more meaningful for us and creates another layer of accountability.”

Named strategic funds include:

### Excellence Funds:

Named Excellence Funds provide opportunities for donors to assist Hoag in maintaining and enhancing the level of excellence in Hoag Institutes, Centers and Programs. These funds provide needed resources for special projects that make the difference between ordinary and exceptional.

### Research Funds:

Named research funds ensure that Hoag departments are able to finance new and forward-thinking research initiatives to advance patient care. These funds allow Hoag’s clinical researchers and physicians to stay on the leading edge of their specialties and to test the latest techniques and treatment approaches.

### Innovation Funds:

Named Innovation Funds provide a unique opportunity for donors interested in supporting phase-one innovation and creative program approaches not otherwise supported by traditional operational funding. These are analogous with “start-up” funds in the business world and allow Hoag physician leaders to develop and pilot new ideas.

### Education Funds:

Named education funds provide funding for skill-enhancing, knowledge-sharing opportunities and high-level conferences and lectures. Dedicated to the continuing development of knowledge, an education fund ensures that resources are available for skill advancement for physicians and nurses as well as community education programs. ■

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If you would like more information about named strategic funds, contact Kenya Beckmann at (949) 764-6384 or [Kenya.Beckmann@hoag.org](mailto:Kenya.Beckmann@hoag.org).

## Reflections from Flynn: *Update on Comprehensive Campaign Planning*

We know that the changes in healthcare, currently and over the next 10 years, will be more extensive and significant than in the first 60 years of Hoag's history. In fact, Hoag's recent announcement about its affiliation with St. Joseph Health is a great example of how Hoag is forming innovative collaborations to transform healthcare.

In fiscal year 2010, the Hoag Hospital Foundation, working closely with Hoag leaders, began strategic planning to develop a comprehensive campaign to support Hoag in a fast-changing environment. The campaign strategic planning process is focused on the intersection of Hoag's strengths, the requirements of the new market to provide excellent care more efficiently, and the areas of care that are most important to the communities we serve.

The Foundation team has completed one of the first critical steps in the campaign planning process which was working closely with Hoag clinical leaders to identify campaign priorities for each Institute and specialty area. We are well underway on the next steps which include forming a Voluntary Organizing Committee (VOC), populated with good friends of Hoag, to serve as a short-term campaign advisory group over the next 18 to 24 months.

The VOC is a sounding board for Hoag leadership and Foundation staff regarding purpose, structure and procedures of the campaign as well as the

campaign themes and communications. At the first meeting, held in June of this year, we presented the VOC with the first draft of the campaign leadership prospectus. The leadership prospectus provides an overview of the campaign and why it's important and, at the very highest level, what it will accomplish. Feedback from the VOC is assisting us in refining the leadership prospectus which we will use during campaign briefings with lead donors.

The enthusiasm and energy that the VOC members bring to the campaign process is tremendous and, we've found, it reflects the engagement of the greater community. We at the Foundation are excited by this opportunity to partner with our community of visionary philanthropists to create something extraordinary together.

The campaign we are developing is the roadmap for our journey to the next generation of healthcare. We trust that the communities that built Hoag and brought it to its current level of excellence will collaborate with us to usher it into tomorrow as a leader in exceptional healthcare. I will continue to provide you with regular updates in this column as we move toward the public kick-off of the campaign in early 2015. ■

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**Flynn A. Andrizzi, Ph.D.**

*President, Hoag Hospital Foundation,  
Senior Vice President, Hoag*







## 2013 Comes with Significant Tax Laws Changes

# Are You Prepared?

If you are like most people, you have probably been putting off creating an estate plan altogether or maybe you just haven't updated it in years. If so, the upcoming changes in tax laws set to take effect in January are as good a reason as any to take the next step in getting a plan in place that's right for you and your family.

Income and capital gains taxes will both increase and the estate, gift, and generation skipping tax exemptions will change dramatically in 2013. The basic estate exclusion amount will be lowered from \$5.12 million to \$1 million in 2013 and the estate tax rate also increases from 35% to 55% in the coming year. The Internal Revenue Service estimates that 114,600 estates of those dying in 2013 will have to pay taxes on their estates. By comparison, in 2011, only an estimated 8,600 estates of people who died paid estate taxes.

What this means to you is that every dollar you have at your death over \$1 million is subject to heavy estate taxes. The value of thoughtful estate planning has never been more important.

A couple of examples may help clarify how these changes in the tax laws may impact your own personal situation. An estate valued at \$5 million in 2012 would be subject to no estate tax at all. However, in 2013, without thoughtful planning, that same estate would owe over \$2 million in estate taxes—that's certainly a tax bill no one wants to think about facing. Charitable estate planning can eliminate the possibility of this scenario. If you haven't drawn up an estate plan yet, there's no better time to do so than now, and we're happy to help you in any way.

Here are a couple of other federal tax laws affecting estate planning in 2013. Capital gains taxes will increase from 15 to 20 percent and the top income tax rate has been raised from 35 percent in 2012 to 39.6 percent in 2013. These adjustments further increase the value of charitable planning. When you itemize deductions and consider your level of giving, you may be able to keep yourself from moving into a graduated tax bracket while also making a more significant impact on the charitable causes most important to you. In the same way, when considering transactions of appreciated stock or property, the increased capital gains tax rate makes considering your estate planning even more important to shelter the value of your assets.

In the event congress amends any of these provisions, we will make certain to communicate those to you as well. We encourage you to spend some intentional time thinking through your own plan and committing to put one in place if you haven't already done so. As always, the Gift Planning Office at the Hoag Hospital Foundation is here to help you and would be happy to provide you with more information on the many benefits of charitable estate planning. We encourage you to use our team as a resource for yourself as you consider these important decisions. Please contact us at (949) 764-7207 and visit our website at [www.hoaghospitalfoundation.org/giftplanning](http://www.hoaghospitalfoundation.org/giftplanning). ■

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The information in this publication is not intended as legal advice. For legal advice, please consult an attorney. Figures cited in examples are for hypothetical purposes only and are subject to change. References to estate and income taxes include federal taxes only. State income/estate taxes or state law may impact your results.

## Hoag Hospital Foundation Board Member is a Catalyst for Hoag Executive Health

Our volunteer leaders are an integral part of the success and growth of Hoag, and thanks to their generous support and ideas, Hoag is now one of the finest healthcare providers in the nation. In fact, a few years ago, Hoag Hospital Foundation board member, Robert Cole, shared an idea about creating a service to provide executive physicals to the local Orange County community. He realized that many executives work long hours and, although they don't want to neglect their health, they didn't have time to go to multiple locations and doctors to get all of the necessary tests.

That idea was the catalyst for the November 2011 launch of Hoag Executive Health, allowing busy individuals to make health a priority. The one-day, customized exam takes place in a luxurious and private facility at the Hoag Health Center in Newport Beach and focuses on medical, fitness and nutrition. Committed to providing a best-in-class health experience, Hoag Executive Health offers a personalized and streamlined experience.

The Hoag Executive Health team provides clients with a report containing all of the findings, recommendations, ongoing referrals (if needed) and a personalized roadmap on how to achieve and maintain optimum health.



### Hoag Executive Health clients receive :

- Comprehensive one-day, medical evaluation and physical
- Customized fitness and nutrition assessment
- Dedicated concierge to help facilitate scheduling, paperwork and all pertinent details
- Relaxing therapeutic massage
- Comprehensive Wellness Report
- Access to HealthCPA™ (Insurance Billing Advocate service) for six months

### The key benefits of Hoag Executive Health:

- Empowers the patient to be proactive about their health
- Provides early detection for potential illness or disease
- Gives a comprehensive approach to health – medical, fitness and nutrition
- Encourages wellness with a customized plan to achieve optimum health

Led by the Chief of Service, James Lindberg, M.D., the program is aimed at providing a level of quality and service that is unsurpassed in the industry. According to Dr. Lindberg, "I've practiced medicine the way I believe medicine should be handled—treating people, not lab values. I enjoy both the art and science of medicine and have found that listening carefully is still the best diagnostic test available." ■

To obtain more information or schedule an appointment, please contact Hoag Executive Health at (949) 999-9300 or visit [www.HoagExecutiveHealth.com](http://www.HoagExecutiveHealth.com)



# Hoag Hospital Foundation

## 2012 Board of Directors

### Directors

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