


HOAG HOSPITAL FOUNDATION in support of Hoag

Scanner



**CNCH CELEBRATES
DONORS AND
HOAG NURSES,
FEATURES DEAN KOONTZ**

FY 2014 ANNUAL REPORT UPDATE:
Nine-Month Results, Change in FY Timing

DONOR PROFILE:
Community-Minded Givers
Philanthropists James and Catherine Emmi

Grateful Hoag patient and bestselling author, Dean Koontz

Dear Friends of Hoag:

We have all been touched by Hoag in one way or another. Some of us have been a concerned friend or family member, grateful that the one we care about is in the best place he or she can be. Some of us have been patients, experiencing first-hand the extraordinary level of care that Hoag provides. Many of us have had both experiences.

All of us owe a debt of gratitude to the thousands of donors and volunteers who have given back on our behalf for the last 60-plus years. As we approach the close of 2014, I am reminded of just how thankful I am for this community that, now as much as ever, is deeply committed to ensuring we all get the level of excellence we expect from Hoag.

We recently held our annual Donor Appreciation & Awards Dinner to acknowledge many of Hoag's committed partners in our ongoing effort to provide the best level of care available anywhere. I'm honored to be a part of such a phenomenal group of donors and volunteer leaders who have helped make a tremendous, positive impact on the health and wellbeing of nearly 400,000 people each year who have put their faith in Hoag.

This year also marked the 10th Anniversary of *Choose Nursing, Choose Hoag* (CNCH), which we commemorated with the annual luncheon. We are pleased and grateful to acknowledge our generous CNCH donors and the dedicated nurses they support. It's phenomenal that, through philanthropic support, more than 600 Hoag nurses have received CNCH scholarship awards.

Thanks to all of our donors and volunteer leaders for making a true investment in our community. Because of you, we can all rest assured that the Hoag brand of care will be there for us when we need it the most.

On behalf of everyone at Hoag Hospital Foundation and the Hoag Hospital Foundation Board, I wish you joy, peace and prosperity throughout the upcoming holiday season and the New Year.

Sincerely,

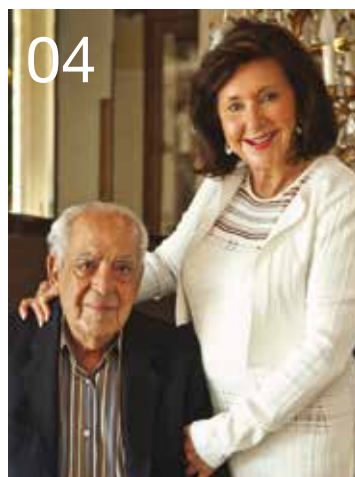


A handwritten signature in dark ink that reads "R. D. Kirwan". The signature is fluid and cursive.

Roger Kirwan
Chair, Hoag Hospital Foundation Board

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10th Anniversary

CHOOSE NURSING, CHOOSE HOAG
2014 LUNCHEON

Celebrating a Decade of Community Support for Nursing at Hoag

A crowd of nearly 300 gathered at the Balboa Bay Club in September for the 10th anniversary *Choose Nursing, Choose Hoag* (CNCH) Luncheon to honor Hoag's nursing scholarship recipients and the donors who so generously support advancing the level of nursing excellence at Hoag.

Established in 2004 by Hoag Hospital Foundation, CNCH is a committed team of volunteer leaders who raise awareness and support for Hoag nurses. This year, the committee raised \$2.1 million, exceeding its annual goal by 25 percent. That, along with the transformational \$2.5 million gift made last year by the Argyros Family Foundation, allowed Hoag to award 363 scholarships and to increase the average scholarship award from \$2,000 to \$6,000.

To date, CNCH has raised more than \$24 million in philanthropic support for nursing including continuing education, training, scholarships and professorships. In fact, over 600 Hoag nurses have received CNCH-funded scholarship awards since its inception.

Local Treasure

Literary luminary with multiple bestsellers in the U.S. and abroad, Dean Koontz, who is also a Hoag grateful patient and donor, graciously donated his time and talent as the featured speaker. Delighted guests laughed along with the consummate storyteller, as he shared anecdotes from his long career as one of America's most popular suspense novelists.

Dean also spoke from the heart about his experience as a patient at Hoag in 2011 when he was unexpectedly thrust into a life-threatening situation due to a previously undetected ulcer. Dean was rushed to Hoag Hospital Newport Beach Emergency Department after passing out in the study of his Newport Beach home. Later, he discovered just how seriously ill he had been when he learned that he'd lost

nearly half his blood supply to internal bleeding.

"While I wouldn't recommend it as a vacation spot, I had a wonderful experience across the board at Hoag," he laughs with his characteristic sense of humor. "It was much more than the technology, it was the level of care and consideration that only people can provide. From the ER to several days in the ICU, I didn't have a moment of fear. I knew I was in good hands."

Donor Appreciation

Gratitude for the vision and generosity of donors who support nurses suffused introductory remarks made by Hoag Hospital Foundation President, Flynn A. Andrizzi, Ph.D. After an invocation by Hoag Chaplain, Reverend Donald Oliver, Hoag Senior Vice President, Clinical Operations and Chief Nursing Officer, Rick Martin, R.N., M.S.N., Ed.D., spoke about the importance of nursing education and the impact of philanthropy.

Nurse scholarship recipient, Edward Boone, R.N., B.S.N., M.S.N.-C, represented his nursing colleagues as he shared his gratitude to donors for what they've made possible in his education and career. A Hoag nurse for 10 years, Edward has been a CNCH scholarship recipient for six of those years.

"Without the scholarship program, I would not have been able to pursue continuing education," explains Edward. "I like to help people, and as I continue my education, I'm better able to do just that. It was important to me to come and personally thank all of the CNCH donors for all that they've done to support the CNCH scholarship program."

We would like to extend special thanks to CNCH luncheon co-chairs Carolyn Bivens and Ilona Martin for all of their great work and support!

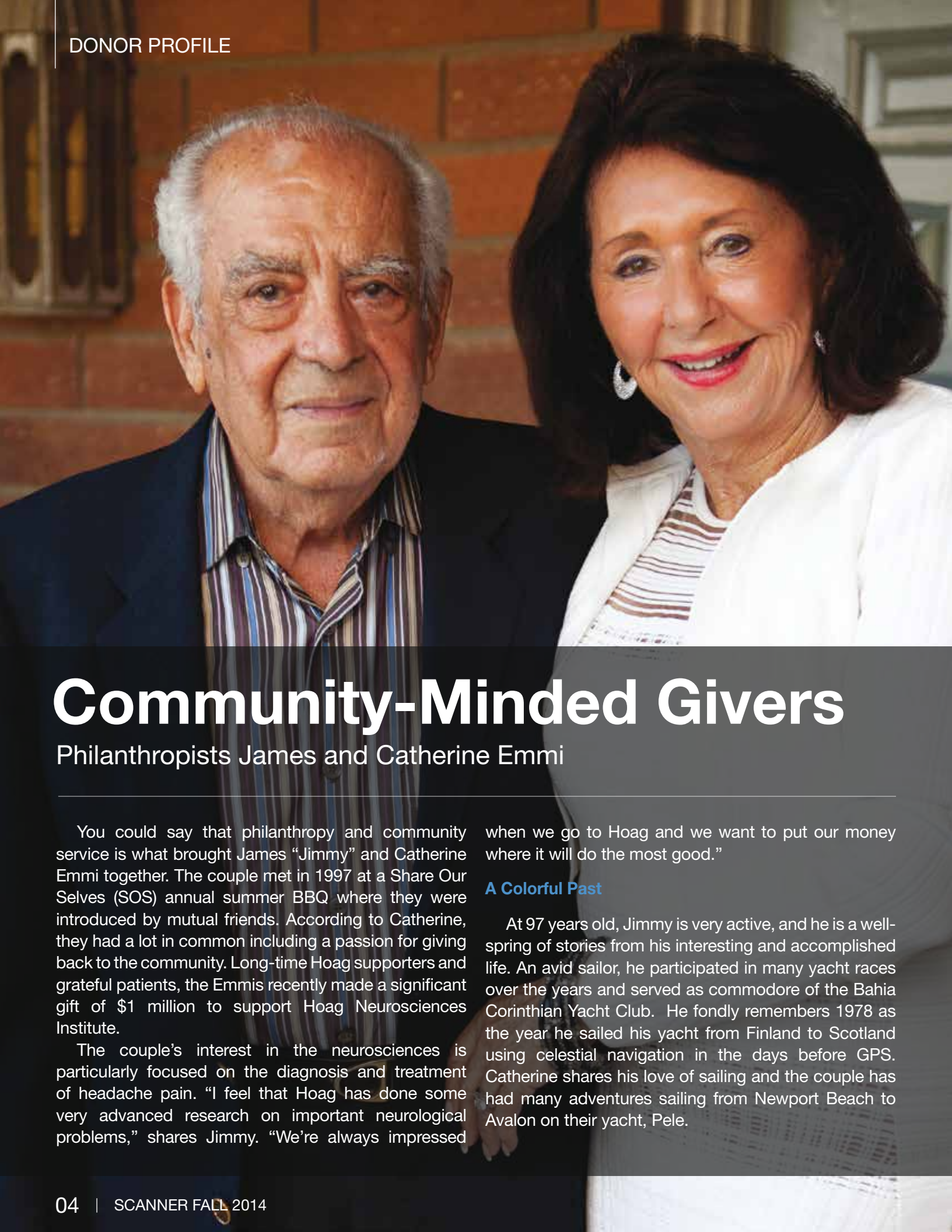
For information on how you can support *Choose Nursing, Choose Hoag*, please contact Angelina Morano at (949) 764-7221 or Angelina.Morano@hoag.org.



Ken Beall

2014 *Choosing Nursing, Choose Hoag* Hall of Fame Honoree

We are delighted to induct Ken Beall into the *Choose Nursing, Choose Hoag* Hall of Fame. A long-time philanthropist and volunteer leader, Ken was a member of the Hoag Hospital Foundation Board when he stepped up to lead the *Choose Nursing, Choose Hoag* committee in 2004. What followed was years of committed service and leadership in which he laid the groundwork for all that CNCH has accomplished, including the opening of the Marion Knott Nursing Education Center and building support for the nursing scholarship program. We sincerely thank Ken for his dedication.



Community-Minded Givers

Philanthropists James and Catherine Emmi

You could say that philanthropy and community service is what brought James “Jimmy” and Catherine Emmi together. The couple met in 1997 at a Share Our Selves (SOS) annual summer BBQ where they were introduced by mutual friends. According to Catherine, they had a lot in common including a passion for giving back to the community. Long-time Hoag supporters and grateful patients, the Emmis recently made a significant gift of \$1 million to support Hoag Neurosciences Institute.

The couple’s interest in the neurosciences is particularly focused on the diagnosis and treatment of headache pain. “I feel that Hoag has done some very advanced research on important neurological problems,” shares Jimmy. “We’re always impressed

when we go to Hoag and we want to put our money where it will do the most good.”

A Colorful Past

At 97 years old, Jimmy is very active, and he is a well-spring of stories from his interesting and accomplished life. An avid sailor, he participated in many yacht races over the years and served as commodore of the Bahia Corinthian Yacht Club. He fondly remembers 1978 as the year he sailed his yacht from Finland to Scotland using celestial navigation in the days before GPS. Catherine shares his love of sailing and the couple has had many adventures sailing from Newport Beach to Avalon on their yacht, Pele.

Jimmy began his career as a mechanical engineer and vividly recalls the excitement of being a part of the support team, analyzing data for the aerodynamicists who invented the airfoil wing for the P-51. Considered by many to be the best airplane flown in WWII, the P-51 boasted the most efficient wing designed up to that point.

“Our country owes those men a debt of gratitude,” shares Jimmy. “They literally locked themselves into a room for a week and didn’t emerge until they had the design for the wing.” His admiration for engineers hasn’t waned. As soon as he was financially able, Jimmy picked out a number of engineering schools and established engineering scholarships.

Jimmy enjoyed a long and successful career. When he retired, he was president of Kimberly Development Company and a longtime manager of apartment properties in Orange County.

A teacher all her life, Catherine Emmi is passionate about education and the pursuit of lifelong learning. Catherine earned her B.A. and B.Ed. degrees from the University of Saskatchewan and her M.Ed. from Pepperdine University. Catherine contributes her time to various committees for local nonprofit organizations that include the Pacific Symphony Support League, Segerstrom Center for the Arts, Women of Chapman, Pacific Chorale, Orange County High School for the Arts, and MIND Research Institute. She’s also very proud of her adult son, Cameron, to whom she’s devoted.

Giving Back

Dedicated philanthropists, Jimmy and Catherine have made significant donations to a number of organizations including Chapman University and the Pacific Symphony. “I’ve worked hard and been fortunate,” says Jimmy. “My legacy is to help the community in areas where we can, like health care, education and the arts.”

Catherine agrees, “Twenty-five years of teaching kindergarten tugs at my heart and makes me want to give back. Jimmy and I have a deep affection for Hoag and feel it is important to support the community we call home.”

Hoag leaders are deeply grateful for the Emmi’s generosity and the impact it will make on our community. “The Emmi’s gift allows the Hoag Neurosciences Institute to provide innovative models that will not only improve care in this community, but will influence the way both inpatient and outpatient neurological care is delivered around the country,” says Michael Brant-Zawadzki, M.D., F.A.C.R., Ron & Sandi Simon Executive Medical Director Endowed Chair, Hoag Neurosciences Institute.

Hoag President and CEO Robert T. Braithwaite adds, “The Emmi’s incredible history of support for Hoag for the past 38 years is exemplary, and we are forever grateful for this most generous gift that will allow Hoag to continue to be the leader in innovative and advanced neurological care.”

Hoag Headache Program

One of the newer programs at the Hoag Neurosciences Institute, the Headache Program addresses one of humanity’s most common complaints. When headaches are severe, or when chronic or relentless headaches occur, sufferers are often seen in Hoag’s emergency rooms and outpatient settings.

“Daily headache sufferers, or those with unusual or particularly severe headaches, need and deserve a trusted and reliable resource,” says Dr. Brant-Zawadzki. “The Neurosciences Institute offers just such a resource through its Headache Program.”

Developed by Philip O’Carroll, M.D., and leveraging a team of outstanding pain specialists, the Headache Program includes a pain/headache management pathway for the emergency room, the inpatient setting and the outpatient headache clinic as well as educational and self-directed pain management tools. The Hoag Headache Program provides care for patients suffering from:

- Tension Headaches
- Migraines
- Chronic Non-Specific Headaches
- Sinus or “Histamine” Headaches
- Medication Overuse Headaches
- Orofacial Pain

Hoag is currently in the process of recruiting an acclaimed headache specialist to help lead this program. For more information on supporting the Hoag Headache Program or the Hoag Neurosciences Institute, contact Hoag Hospital Foundation at (949) 764-7217.

Treating the Disease of Addiction

Hoag's Addiction Treatment & Recovery Program

When scientists began to study addictive behavior in the 1930s they assumed that lack of will power was the basis for addiction. Today, groundbreaking discoveries about the brain have revolutionized our understanding of compulsive drug and alcohol use.

Hoag Neurosciences Institute has used this knowledge to develop effective prevention and treatment approaches that reduce the toll that drug and alcohol addiction takes on individuals and families. One of the earliest programs of its kind launched in Orange County, Hoag's Chemical Dependency Unit has served our community for 25 years. In the past, the

Unit has focused on alcohol addiction and produced admirable results for this target population.

The last five years have seen an explosion of addiction to prescription drugs and illegal narcotics, particularly among young adults. A complicated diagnosis in and of itself, addiction often has co-occurring disorders such as depression, chronic pain and anxiety that require a coordinated approach with multi-disciplinary care. Hoag is now leveraging its pioneering approach to dependency and its associated mental health disorders to address comprehensive, neurobehavioral needs across the board.



Stigma Busting

We know that people with the disease of drug and alcohol addiction should receive the same clinical rigor and measure of compassionate care as those with conditions such as cancer, heart disease and diabetes. Unfortunately, one of the hurdles to timely and effective treatment is the misconception that has persisted in the general public that addiction is a moral failing. As a result, shame or guilt is often an impediment to seeking treatment.

“People say if you consider addiction a disease, you’re taking the responsibility away from the addicted person, but that’s wrong,” says Michael Brant-Zawadzki, M.D., F.A.C.R., Ron & Sandi Simon Executive Medical Director Endowed Chair, Hoag Neurosciences Institute. “If a person has heart disease we aren’t eliminating their role in improving their own health. We’re having them exercise, change their diet and stop smoking. The fact that someone has a disease, recognizes that there are physiological changes, in this case, within the brain. Addiction is a neurobehavioral disorder with an intrinsic neurochemical basis and not a matter of will power.”

From Dedicated Unit to Comprehensive Program

Philanthropy is allowing Hoag to realize the vision of transforming the program from a solid Chemical Dependency Unit within the hospital to a comprehensive Addiction & Recovery Program that ushers patients through the continuum of care from medical detoxification through residential treatment and ongoing outpatient support for long-term addiction recovery.

Enhancements are currently underway to add a 21-bed residential treatment unit to provide a dedicated space for patients to receive 30, 60 or 90 days in a home-like therapeutic setting adjacent to the hospital. According to Marshall Moncrief, director of Hoag Chemical Dependency Recovery Center, patients who start the detox process are often in severe medical distress that requires the expertise and monitoring provided in a hospital setting to be safe and effective.

“Treatment at Hoag’s residential unit will be on par with the ‘brand name’ units linked to celebrities that we read about,” he says. “The difference is that our unit, with its comfortable, home-like setting, is adjacent to an acute care hospital, so we can provide the high level of multidisciplinary psychiatric and medical care needed for a safe detoxification process. That also means we have the emergency room and 24-hour

security nearby. We will be the only residential treatment center I know of that is co-located with a hospital.” The new residential treatment unit is scheduled to open in early 2015.

Marshall also notes another distinct advantage to treatment at Hoag. “One of the strengths of providing addiction treatment right in the backyard of the people we are treating is that our ‘alumni’ stay connected to us and to each other through meetings and social events we plan,” he shares. “Because we’ve been around for 25 years, we have a very robust population of those who have completed treatment. This social network, dedicated to healthy living, really helps support long-term behavior change.”

There’s So Much More We Can Do

Thanks to donor support, Hoag Addiction Treatment & Recovery Program is enhancing and expanding the inpatient detoxification facility in Newport Beach. It’s also adding outpatient detoxification capabilities to better meet the needs of working professionals, both in Newport Beach and Irvine. The Program is adding staff including a Clinical Outreach Coordinator to educate primary care physicians about Hoag’s capabilities and increase access to those people in need of treatment. Staff additions also include a Clinical Manager to manage the individual needs of patients from medical detox through treatment and ongoing support.

By expanding into a residential treatment model for substance abuse and related mental health disorders, Hoag is taking a necessary step towards an integrated mental health delivery system that, with donor support, will include crisis centers, intensive outpatient and other transitional residential services for mental health needs throughout our region.

With the infrastructure in place, support is needed to continue to build and enhance the program. Philanthropy will also allow us to launch prevention and early intervention programs in schools and after-school outpatient programs for adolescents who are facing challenges with emerging depression, social anxiety and substance experimentation. Additionally, donor support is a major source of scholarships for uninsured and underinsured patients seeking addiction treatment.

If you would like more information on how you can support Hoag Chemical Dependency Recovery Center and Hoag Neurosciences Institute, please contact Hoag Hospital Foundation at (949) 764-7217.

A FEW HIGHLIGHTS FROM FY 2014

October 1, 2013 to June 30, 2014

To align with Hoag's change in fiscal year-end timing, Hoag Hospital Foundation's 2014 fiscal year was nine months, ending on June 30, 2014. Going forward, HHF's fiscal year will be July 1 through June 30 and match a more traditional fiscal calendar. Despite the abbreviated fiscal year, Hoag Hospital Foundation achieved outstanding results.

STRENGTH IN NUMBERS

\$38.5 MILLION*

reported by Hoag Hospital Foundation in fiscal year 2014, exceeding its \$34M goal

385

Donors have reached the \$250,000 cumulative giving level as of fiscal year 2014 to become Hoag Benefactors

363

Choose Nursing, Choose Hoag scholarships awarded this year to Hoag nurses to advance their education thanks to the generosity of our donors including Argyros Family Foundation.

ENDOWING THE FUTURE



New Endowed Fund

announced in honor of Dr. Pravin Shah to advance care and secure Hoag's status as a leader in innovative cardiovascular diagnosis and treatment

*Philanthropic results as disclosed herein captures all commitments received during the fiscal year, regardless of revocability, including but not limited to, pledge payments received during the fiscal year on previously recognized pledge commitments and pledge discounts. Not prepared in accordance with Generally Accepted Accounting Principles (GAAP).

GIFT HIGHLIGHTS

\$10M

An anonymous donor designated a \$10M estate gift to Hoag to support the underserved population in our surrounding communities

\$1M

Varla and Curt Knauss made an irrevocable \$1M estate gift, designating \$500,000 to Hoag Neurosciences Institute

\$1M

Loyal donors James and Catherine Emmi gave a \$1M gift to support Hoag Neurosciences Institute

\$1M

Bob and Ginger Juneman made an irrevocable estate gift of \$1M

EVENTFUL GAINS



Circle of Support

Circle 1000's 27th Annual Founders' Celebration Brunch raised more than **\$900,000**

Circle 1000 has raised more than **\$15M** to date to support outstanding cancer care at Hoag



Jeffrey M. Carlton Heart & Vascular Institute

The unveiling of the Jeffrey M. Carlton Heart & Vascular Institute honored the legacy of the late Jeffrey Carlton



Golfing and Giving

Toshiba Classic raised over **\$1M** for the Mary & Dick Allen Diabetes Center and has raised over **\$17M** to benefit Hoag in the past 17 years



Big Ideas in the Desert

100 Hoag physician and philanthropic leaders attended the Big Ideas in the Desert event at the Vintage Club in Indian Wells

& Appreciation & Gratitude

Honoring Hoag Donors and Volunteers

On a special night in September, Hoag Hospital Foundation recognized and celebrated our extraordinary community of donors and volunteers. The 2014 Donor Appreciation & Awards Dinner, held at The Resort at Pelican Hill, was a token of appreciation and gratitude. The program included remarks from Hoag's president and CEO, Robert T. Braithwaite; Hoag Hospital Board Chair, Gary McKitterick; as well as a panel of our renowned Hoag clinicians sharing about innovations in health care:

Subbarao V. Myla, M.D., F.A.C.C., F.S.C.A.I., M.M.M. (USC), C.P.E.
Medical Director, Cardiovascular Catheterization Laboratories, Hoag



Kanoe Allen, M.S.N.-C.N.S., P.H.N., R.N., O.N.C.
Executive Director & Chief Nursing Officer, Hoag Orthopedic Institute



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



Burton L. Eisenberg, M.D.
*Grace E. Hoag Executive Medical Director Endowed Chair,
Hoag Family Cancer Institute*

Guests also enjoyed a video entitled, *The Lives We Touch*, featuring heartfelt testimonials from grateful patients. To view the video visit the "Spotlight" link on www.hoaghospitalfoundation.org.



Congratulations to the 2014 Vin Jorgensen Award Winners

Each year Hoag Hospital Foundation honors those whose volunteer service is outstanding and deserving of special recognition. Vin Jorgensen award winners are those who organize and lead programs; plan and conduct Foundation activities, benefits and special events; provide guidance and direction; set policy and procedure; and encourage their friends to financially support Hoag.



Joan & Andy Fimiano
Hoag Hospital
Foundation Board



Ralph Hillman
Hoag Hospital
Auxiliary



Arlene Key
552 Club



Karen Linden
Circle 1000



Joe Obegi, Esq.
President's Circle



Straub Distributing
Corporate Partnership

**Please join us in
congratulating our 2014
award winners!**

THE
STARS OF THE NIGHT





FUN, FRIENDS AND FINE FOOD!

HOAG SUMMER MOVIE CLASSIC

Nearly 800 guests sampled dishes from 30 noted Orange County restaurants and enjoyed a screening of the movie *GRAVITY* at the 27th annual Hoag Summer Movie Classic food and film event held at the OC Fairgrounds on June 11.

Hosted by the Hoag Hospital Foundation and its 552 Club, the event raised \$135,000 to support world-class care at Hoag. The restaurants offered everything from ceviche shooters and creative tacos, to sliders and decadent desserts. Each restaurant donated its time and talent to this event.

The event featured a raffle that included gift packages from participating restaurants and a grand prize of a one-year lease for a BMW 428i Coupe, courtesy of Sterling BMW in Newport Beach.

The Summer Movie Classic has raised over \$2 million dollars and introduced a number of new friends to Hoag since its inception in 1988. Thanks to all of the sponsors, participating restaurants and guests who made this event such a smashing success!

To see additional photos from the event, log on to <http://facebook.com/hoaghospitalfoundation>.

Charitable Gift Planning Menu

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, 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.



Loyal, Brave & True

Honoring the Legacy of Bill Bracey

It has been said that the World War II generation is the “Greatest Generation.” William E. Bracey, who passed away in June of this year, at age 90, was a wonderful example of that admirable ethos. Bill was not only a Hoag Planned Giving donor, he was also a long-time Hoag Hospital Auxiliary Volunteer at the Hoag Family Cancer Institute.

Serving America

Bill graduated from Wm. L. Dickenson High School in New Jersey in 1941 and immediately enlisted in the U.S. Army. In 1944, he found himself in Wuustwezel, Belgium, on the Dutch border as a combat infantry man. During his service to our country, Bill received seven medals, including the Combat Infantry Badge, for which he was most proud. Bill was honorably discharged in 1945.

After returning home from the war, Bill attended the Stevens Institute of Technology (SIT) in Hoboken, New Jersey. While he was at SIT he met the love of his life, Joan Johnson. The two were married shortly thereafter and enjoyed 43 years together before Joan passed away in 1993. The couple had two children and, in 1970, relocated to Corona del Mar, California. When Bill retired in 1989, he and Joan traveled together and especially enjoyed spending time with their grandchildren.

Win-Win Giving

After Joan’s passing, Bill focused his attention on his grandchildren and great grandchildren. It was with them in mind that he approached the Hoag Hospital Foundation (HHF) to learn about how to live in his home and receive income. The professionals at HHF showed Bill that he could deed his property to HHF in exchange for a life estate. Bill signed a life estate agreement giving title of his personal residence to HHF while retaining the right to its use for the remainder of his lifetime.

When the agreement was made, Bill received an income tax deduction for the present value of this future gift to Hoag. Bill then gifted the value of the future gift in exchange for a Charitable Gift Annuity, which paid him income for his lifetime. Bill was grateful that he could stay in his home and get a quarterly check in the mail. He was able to spend quality time with his grandchildren without having to worry about income.

Bill’s foresight and well-considered estate planning not only helped support outstanding care in our community, it allowed him to use his assets strategically to provide for his family. His generosity will benefit generations to come in our community and beyond.

If you would like more information about how to incorporate Hoag in your estate plan, please contact Julie Heggeness, J.D., C.S.P.G., at (949) 764-7206 or Julie.Heggeness@hoag.org.

Reflections from Flynn:

Comprehensive Campaign Planning Update

For the first time in Hoag's history, the entire organization is coming together to identify ways that philanthropy can be used to accelerate growth and innovation in every area. With a working goal of \$500 million, the comprehensive campaign, which will fund Hoag's continued innovation and excellence, will launch in September 2015.

In the past, we focused on one "bricks and mortar" project at a time. And every time we came to the community, it responded in a big way. What's different about this comprehensive campaign is that we will focus on everything from endowed chairs, to innovative pilot programs, to nursing scholarships and leading technology. Every part of Hoag will be engaged in the campaign, and our priorities will be "comprehensive" in the truest sense of the word.

The Foundation has worked closely with Hoag clinical leaders and staff from each institute and specialty area to identify campaign priorities and visionary goals that will make a positive and even transformative impact on health care in Orange County. The campaign fundraising priorities align with the following campaign themes:

Big Ideas—Success in today's health care landscape is inextricably entwined with innovation. Only organizations able to pioneer better ways to prevent, diagnose, treat and cure will succeed in the short term and thrive in the long term. Donors will have the opportunity to support development and implementation of some of the most exciting advances in health care such as personalized medicine and other new care protocols.

Empowering You—The next generation of health care demands that we empower individuals with the right

support at the right time to achieve the highest and best level of health and quality of life. Campaign priorities, such as nurse navigators and real-time access to health information, will provide community members with the tools and information needed for prevention as well as navigation through chronic diseases and major health events.

Extraordinary Leaders—Recognizing the vital role of physicians and nurses in delivering Hoag's brand of care, the campaign will provide funding and resources needed to support clinical leaders in moving care forward such as endowed chairs as well as continuing physician and nursing education.

As we move forward with the campaign planning, we recognize that physician engagement and participation is vital to our overall success. We have partnered with Hoag physicians to launch the Physician Campaign Leadership Group (PCLG), which directly connects Hoag physicians with the upcoming campaign on multiple levels. The PCLG, which consists of nearly 100 Hoag physicians, is led by Drs. Michael Brant-Zawadzki, Allyson Brooks and Kris V. Iyer. Each physician leader heads working groups with goals such as educating physicians about philanthropy, assisting grateful patients in directing gifts to Hoag and recognizing Hoag physicians who partner with the Foundation on Hoag's behalf.

As we move closer to the public launch of Hoag's first-ever comprehensive campaign, I look forward to sharing more about the exciting campaign planning developments.



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

Hoag Hospital Foundation

2015 Board of Directors

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James O. Buckingham	Gary S. McKitterick	James D. Slavik
Pei-yuan Chia	James T. Morris	

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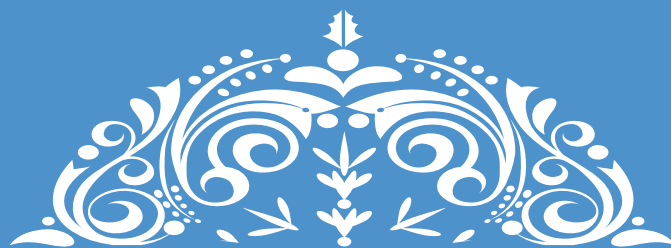
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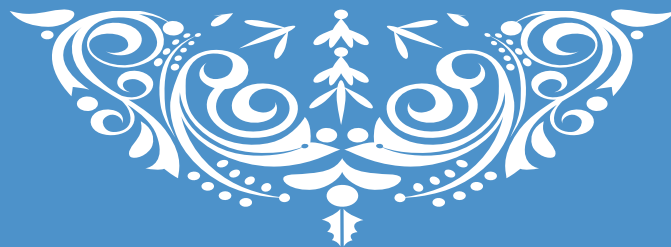


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Christmas Carol Ball

SATURDAY * DEC 06 2014 * 5 PM

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For information please contact Jennifer Garner,
(949) 764-7211 or Jennifer.Garner@hoag.org.