

A Hoag Hospital Foundation Publication

SCANNER

WINTER EDITION

2015

Hoag Promise Campaign Launch

First-Ever Comprehensive Campaign in Hoag History



IN THIS ISSUE

12 Donor Recognition: Coufos Family Center for Philanthropy

13 Donor Profile: Carmela and Ben Du

15 Endowed Chair: Honoring Our Healers, Celebrating Our Donors

LETTER FROM THE CHAIR

Dear Friends of Hoag:

We have very exciting news to share in this edition of *Scanner*. We are celebrating the recent public launch of Hoag Promise, Our Campaign to Lead, Innovate & Transform. This is Hoag's first ever comprehensive campaign, and it will be nothing short of transformational.

In the pages that follow you will get an overview of the Hoag Promise Campaign priorities and progress to date. When we talk about Hoag's promise we know that, in some ways, the promise lies with each of you and your intentions, actions and support going forward. We're also talking about Hoag's promise to you, our community, to provide the extraordinary level of service and care you've come to expect.

But, in a broader sense, we are also talking about promise as potential. That is Hoag's potential to lead the way forward in first imagining, and then creating, the best of what health care can be. We are so fortunate that today, Hoag is the culmination of the talent, passion, commitment and plain old-fashioned hard work of so many caring and generous people. We are truly grateful to our generous Hoag Promise donors and volunteers who are collaborating with us to take Hoag into the future.

You will also read about the two latest endowed chairs, bringing Hoag's total of endowed chairs to 11. Thanks to the support and the vision of our donors, Hoag is innovating by bringing the endowed chair model to a community health care setting. This is truly unprecedented outside of academia, and we thank Ben and Carmela Du and Joan and Andy Fimiano for making the two new chairs possible.

It's an honor to serve our philanthropic community who has rallied around the idea of ensuring world-class health care here in Orange County. I'm proud to partner with you to shape Hoag's future. I deeply appreciate your continued support and look forward to what we will accomplish together going forward.

Sincerely,



Cindy Stokke
Chair, Hoag Hospital Foundation Board

P.S. Speaking of transformation, we hope you enjoy the newly redesigned and updated *Scanner* Magazine!



CONTENTS



01

HOAG PROMISE

- 01 | Making History: Public Kickoff of Hoag Promise Campaign
- 05 | Keeping the Promise of Hoag
- 07 | Hoag Promise Campaign Progress Report
- 09 | Working Together for the Greater Good: Volunteer Recognition
- 11 | Message from the Campaign Leadership Council



12

DONOR RECOGNITION

- 12 | Coufos Family Center for Philanthropy



13

DONOR PROFILE

- 13 | Carmela and Ben Du



15

ENDOWED CHAIRS

15 | Honoring
Our Healers,
Celebrating
Our Donors



17

EVENTS

17 | Annual
Choose Nursing
Choose Hoag
Luncheon



20

GIFT PLANNING

20 | Ahead of Her
Time: Margaret
Richardson



21

HOAG HOSPITAL FOUNDATION

21 | Message from the
President

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HOAG PROMISE

Celebrating the Public Launch of Hoag Promise, Our Campaign to Lead, Innovate & Transform

On Saturday, September 26, nearly 500 of Hoag's closest friends and supporters joined the Hoag Hospital Foundation to celebrate the public launch of Hoag Promise, Our Campaign to Lead, Innovate & Transform. The first-ever comprehensive campaign in Hoag's history, Hoag Promise has a goal to raise \$627 million by 2020 to help Hoag remain at the forefront of advanced health care.

Those living near Hoag Hospital Newport Beach may have noticed the 120-foot-long white tent erected just outside of the hospital's south entrance in the days leading up to the event. It was a gorgeous venue for a history-making night. Local TV reporter, Michele Gile, was the emcee for an evening that touched and inspired while educating the audience about Hoag's organization-wide campaign.

Hailed by all as a successful kickoff, the evening's multi-media program featured an engaging mix of personal messages from community leaders, Hoag physicians and grateful patients along with Hoag President and CEO, Robert T. Braithwaite and Hoag Hospital Foundation President, Flynn A. Andrizzi, Ph.D. Live piano music and a surprise solo by *American Idol* finalist, Pia Toscano, were a few of the many special touches guests enjoyed while learning about the campaign.

Campaign Central!

Hoag Hospital Foundation's New Website Launch Coincides with Kickoff Event

We've completely revamped the Hoag Hospital Foundation website to include everything you need to know about the Hoag Promise Campaign including fundraising priorities, goals and progress; patient stories; donor profiles; latest news and events and much more. Log on to HoagHospitalFoundation.org or HoagPromise.org and check it out!







HOAG PROMISE

The Hoag Promise Campaign is driving Hoag's continued clinical leadership, innovative spirit and transformative potential

Hoag Promise, Our Campaign to Lead, Innovate & Transform is comprehensive in the truest sense of the word. It goes wide. The campaign encompasses every institute, center and specialty area of Hoag. And, it goes deep. It includes programs, innovation opportunities, education, research, technology, facilities and clinical staff for each area. Every Hoag physician leader is engaged. We asked them to think strategically about what it would take to transform care over the next decade and beyond.

Keeping the Promise of Hoag

Visionary Goals

For the first time in Hoag's history, the entire organization came together to identify ways to use philanthropy to accelerate innovation across the organization. The resulting campaign goals fall into one of three overarching themes, seen on the adjacent page, that connect fundraising priorities from throughout Hoag to meaningful community benefits.



The Promise of Big Ideas

Only the pioneers will thrive in the long term. Success is inextricably linked to the willingness and the ability to innovate. In many areas, the Hoag Promise Campaign invests in big leaps over incremental change. Some ideas will be revolutionary, some won't. All will advance us and challenge us to think differently. Examples include:

- Personalized Medicine
- Connected Care—IT Innovations
- New Technology and Equipment for Diagnosis and Treatment
- Pilot Programs for New Care Processes
- Clinical and Translational Research
- Named Innovation Funds
- Telemedicine



The Promise of Empowering You

Today, engaging with the health care system is anything but user-friendly. The process is often fragmented and disjointed. Can you imagine a better way? We can. What if you had the right people, tools and information to seamlessly navigate a chronic disease or major health event? The Hoag Promise Campaign priorities empower patients. Clinical excellence is a given. Patient peace of mind and quality of experience are equally important. Examples include:

- Nurse Navigators
- Navigation-Focused Programs and Technology
- Real-Time Access to Health Information
- Patient Education
- Diabetes Care
- Community Medicine
- Health Centers



The Promise of Extraordinary Leaders

We expect great things from our nurses and physicians. They deliver. Consistently. Hoag attracts the best of the best. And, the Hoag Promise Campaign priorities support them in delivering Hoag's brand of care. The goal is simple. To give these dedicated healers the resources they need to move care forward. Examples include:

- Endowed Chairs
- Physician Education
- Physician Leadership Awards
- Nursing Scholarships and Certifications

HOAG PROMISE

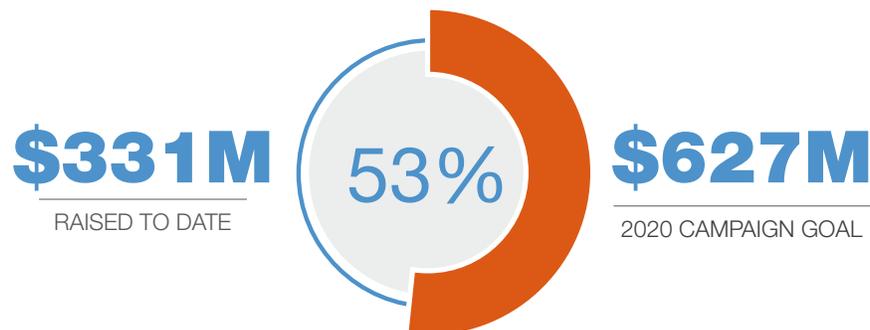
Campaign Progress Report

In 2010, the Hoag Promise Campaign began with a five-year “quiet phase.” During that preparatory time, the Hoag Hospital Foundation team did the behind-the-scenes work necessary to launch an effort of this magnitude. Chief among the quiet-phase objectives was communicating about the campaign to Hoag’s closest supporters and generating lead gifts.

We are deeply grateful for the generosity and foresight of the donors who’ve stepped forward early to throw their support behind the campaign. The funds raised are already connecting Hoag patients to new resources, including leading-edge programs, procedures, technology and community-based facilities that increase access to Hoag’s services.

Campaign Progress-to-Date

Campaign duration: 2010 – 2020



Newest Gifts Announced at Kickoff

Funding Innovation

Inspired by a long interest in and commitment to the way patients experience health care, Pei Chia and Kitty Shen invested \$2M to launch a pilot program that supports nurse navigators, specially trained nurses who guide and support patients through serious health challenges. The pilot program enables nurse navigators to use technologies and care pathways that reduce their administrative burden. This gives them more time to directly help and advocate for patients throughout the course of their care. Pei and Kitty are some of the first donors to pay for a pilot innovation project from which we'll learn how to improve and expand health care navigation throughout Hoag.

Empowering a Community

Because of high rents, many non-profits serving the most vulnerable in our community are limited in their ability to provide care in the areas surrounding Newport Beach and Costa Mesa. And yet, the need is all around us. Hoag responded by creating the Center for Healthy Living which offers an affordable space for non-profits. The Center assists these non-profits in collaborating so community members can draw on their resources more efficiently. The Hoag Family Foundation stepped forward to support Hoag Community Benefit with a \$5M gift. Hoag has named the Melinda Hoag Smith Center for Healthy Living to recognize the Hoag family's generosity.

Supporting Extraordinary Nursing

Hoag is committed to ensuring that Hoag nurses deliver excellent care with compassion. The Crean Foundation donated \$3M to establish the Crean Nursing Education Fund which will empower nurses to achieve their educational goals, take on advanced clinical roles, broaden their skillsets and advance patient care through evidenced-based best practices. The largest gift to date in support of Hoag nursing, this gift will help Hoag to provide the highest quality nursing care anywhere in the country.

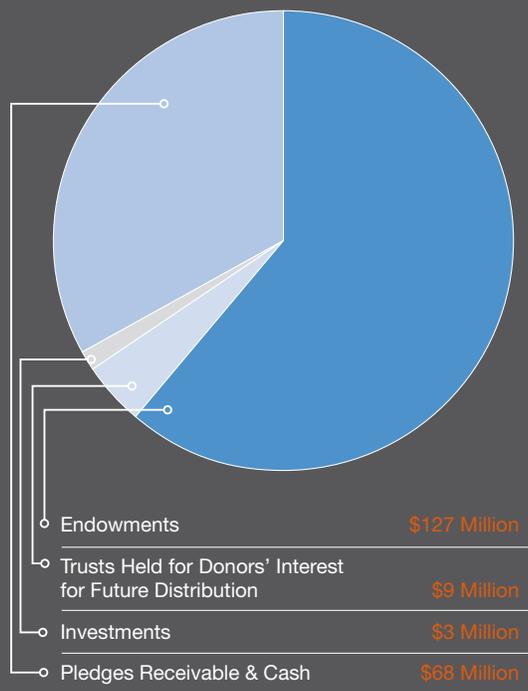
Now in its "public phase," Hoag Promise Campaign funds will continue to enhance Hoag's physical facilities, add to Hoag's 11 endowed chairs, increase access to clinical trials, create new patient-care technologies, and expand Hoag's nationally renowned institutes and programs.

For information on the Hoag Promise Campaign, contact us at (949) 764-7217 or visit www.HoagPromise.org.

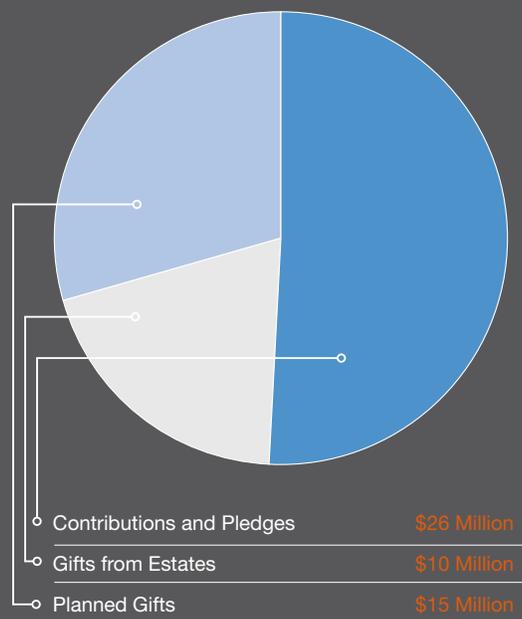
Hoag Hospital Foundation Stats Fiscal Year 2015

Gains made in FY 2015 added a significant boost to our Hoag Promise Campaign totals. Below is a breakdown of annual fundraising progress for the past fiscal year:

\$207M Total Assets



\$51M Total Productivity



* Philanthropic results as disclosed herein capture 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).

HOAG PROMISE

Working Together for the Greater Good

We extend our deepest thanks to the passionate community members and volunteer leaders who are coming together to support the Hoag Promise Campaign. Their council, advocacy and support are playing an integral role in the campaign's success.

Campaign Leadership Council

The Hoag Promise Campaign Leadership Council (CLC) members are the community leaders of the Hoag Promise Campaign. Members represent the campaign to the public and serve as close partners and guides to the Hoag Hospital Foundation throughout the duration of the campaign. CLC members:

Dick Allen
Terry Callahan
Pei-yuan Chia
Jim Coufos
David Horowitz
Roger Kirwan
Karen Linden
Ginny Ueberroth

Campaign Steering Committee

Members of the Hoag Promise Campaign Steering Committee (CSC) support the success of the campaign through guidance, advocacy and strategic collaboration with Foundation staff and volunteers. CSC members:

Megan Acosta, Esq.
Richard Afable, M.D.
Kenneth Beall
Trish Berchtold
Michael Buxton
James Caillouette, M.D.
Dianne Castner
Michael Castner
Lauri Delson
Gary Fudge
Mark Hardtke
Curt Knauss
Varla Knauss
Ilona Martin
Gary McKitterick
Stephen Prough
Aidan Raney, M.D.
Bob Roth
Marc Scher
Jeffrey Shaw
Judy Voltmer
Richard Voltmer
Kyle Wescoat

Physician Campaign Leadership Group

The Physician Campaign Leadership Group (PCLG), which consists of nearly 100 Hoag physicians, provides guidance to the Foundation on topics such as physician education about philanthropy, grateful patient fundraising and physician recognition. The PCLG is led by Co-Chairs:

Michael Brant-Zawadzki, M.D., F.A.C.R.

*Ron & Sandi Simon Executive Medical Director
Endowed Chair, Hoag's Neurosciences Institute*

Allyson M. Brooks, M.D. , F.A.C.O.G.

*Ginny Ueberroth Executive Medical Director
Endowed Chair, Hoag's Women's Health Institute*

Kris V. Iyer, M.D., F.A.C.P., F.A.C.E.

*Senior Vice President / Chief Administrative
Officer, HMTS and Executive Medical Director,
Mary & Dick Allen Diabetes Center*

Campaign Advisory Committees

Campaign Advisory Committees are critical to the success of the Hoag Promise Campaign. With a focus on a particular area of interest, volunteers connect Hoag's institutes, centers and campuses to potential supporters and serve as close community advisors to physician and administrative leaders. Campaign Advisory Committee Chairs include:

Mary & Dick Allen, Co-Chairs

Mary & Dick Allen Diabetes Center

Kimberly Bernatz, Chair

Planned Giving Advisory Committee

Robert Brunswick & Bob Roth, Co-Chairs

Jeffery M. Carlton Heart & Vascular Institute

Jim Buckingham & Jamie Shepherdson, Co-Chairs

Hoag Family Cancer Institute

Heather Labow, Chair

Hoag Huntington Beach

Doug Meece, Chair

Choose Nursing, Choose Hoag

Cindy Stokke, Chair

Hoag's Neurosciences Institute

Kyle Wescoat, Chair

*Hoag Irvine/Orthopedic Education &
Research Institute*

Currently Recruiting

Hoag's Women's Health Institute

For more information about the Hoag Promise Campaign and how you can support the future of health care in our community, please visit www.HoagPromise.org or call the Hoag Hospital Foundation at (949) 764-7217.

HOAG PROMISE

Our Promise

When the leaders of Hoag asked us to help guide one of the most ambitious and comprehensive campaigns in the history of community-based medicine, our answer was immediate, unqualified and unanimous—**YES**.

It's only fitting that Hoag was founded by community members banding together 60-plus years ago. Since then, community partnerships have shaped Hoag into a national leader in innovative and compassionate care. Going forward, philanthropic support will be critical to Hoag's ability to lead in a time of unprecedented change.

The Hoag Promise Campaign benefits every area of Hoag. Hoag leaders collectively identified ways to use philanthropy to accelerate innovation across the organization. Every institute and center is touched. Every program is enhanced.

Our campaign goal of \$627 million is ambitious. Yet, we stand with Hoag knowing that these investments will pay off in big ways for our community. Together we will ensure a future in which the very best health care continues to be available in our own backyard.

Most important of all, this campaign ensures that Hoag will always be here for you—to **LEAD. INNOVATE. TRANSFORM.**

As the Hoag Promise Campaign Leadership Council, that's our promise.



DICK ALLEN



JIM COUFOS



KAREN LINDEN



TERRY CALLAHAN



DAVID HOROWITZ



GINNY UEBERROTH



PEI-YUAN CHIA



ROGER KIRWAN

All in the Family

Jim, Viki and Christian Coufos Continue a Multi-Generational Legacy of Giving Back

For years, the Coufos family has supported Hoag through philanthropy, primarily directed to nursing education and Jim's committed service as a volunteer leader. In spring 2015, the family agreed it was time to do something more. Jim and Viki, along with son Christian, made a planned estate gift in support of the Hoag Promise Campaign.

In recognition of Jim's years of volunteerism and the family's generous financial support, the Hoag Hospital Foundation named its headquarters the Coufos Family Center for Philanthropy.

"We are very proud to support Hoag and to have been part of the growth that has happened here," says Jim. "There is so much need for new and innovative technology, and every gift helps us reach the next level."

Formerly the Chair of the Hoag Hospital Foundation Board and a current Director, Jim is also a Director on the Hoag Charity Sports Board, which oversees the Toshiba Classic. He serves as a member of the Campaign Leadership Council for the Hoag Promise

Campaign. For many years, he served as Chair of *Choose Nursing, Choose Hoag*. Last year he received the Vin Jorgensen Award for his years of dedication to Hoag.

Viki, who was a nurse for 12 years, feels a personal connection to Hoag nurses. "On three separate occasions, Hoag has been there for our family," she says. "The nurses here stand out from any hospital I've been to." She agrees with Jim that nurses are the flagship of Hoag and are the ones patients and families remember for their kindness and service.

The Coufos clan established their planned gift with an eye toward continuing their family's philanthropic legacy. Both Viki and Jim were raised with the strong value of giving back and supporting their community. They instilled that same spirit in Christian.

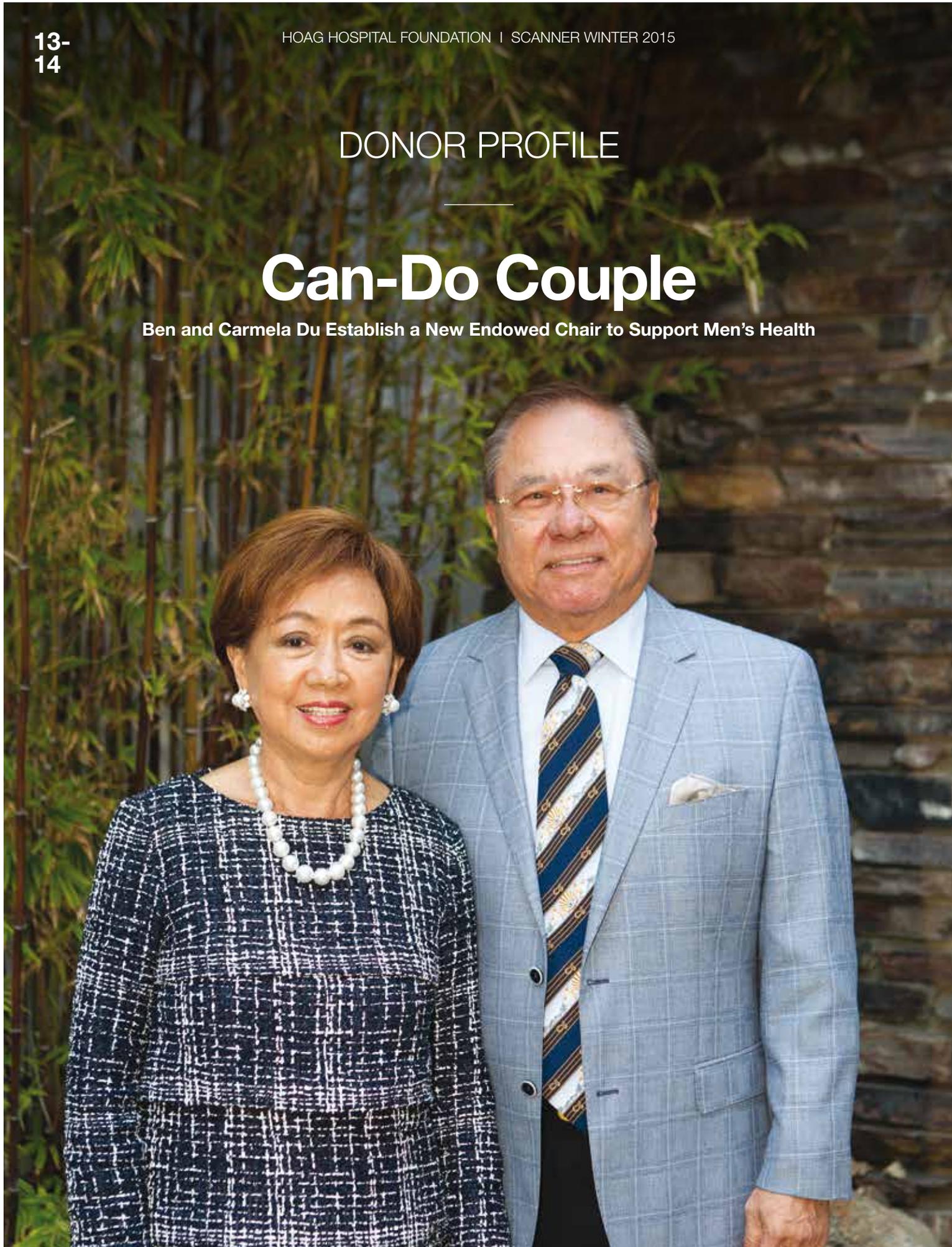
"We've been very blessed throughout our lives," he shares. "We are proud to be involved with Hoag and all of the wonderful people associated with it. This gift has great personal meaning for our entire family."



DONOR PROFILE

Can-Do Couple

Ben and Carmela Du Establish a New Endowed Chair to Support Men's Health



Adventurous spirits, Ben and Carmela Du have a long history of moving boldly and joyfully through life. As newlyweds who had just finished university, they packed up everything and moved to the United States from their native Philippines.

“It was an adventure,” Carmela remembers. “We were so young, and we didn’t think of the consequences. We just did it.”

Shortly upon arriving in Orange County, where Ben attended California State University at Fullerton for his M.B.A., their daughter, Lizette was born. With their can-do spirit intact, they embraced all of the joys and challenges of adapting to life in the U.S.

“Dr. Yoshida’s groundbreaking research on preventive medicine and care gives hope and healing to thousands of people with cancer.”

Creating his own opportunity, Ben founded Flojet Corporation, a leading manufacturer of positive displacement pumps and other electro-mechanical components with facilities in Irvine, England and China. “We built it from scratch,” Ben says. “Carmela was the chief financial officer, and together we grew it from a small start-up to a very profitable company.”

Through it all, they remained a close-knit family which has expanded to include

granddaughters, Christiana and Jessica. Ben and Carmela recently took the entire family, and a few close friends, on a yacht cruise to the Mediterranean to celebrate fifty years of marriage.

When it came time to slow down and enjoy all they had built together, Ben and Carmela made the decision together to sell FloJet. “We were ready for a change,” he says. “We want to keep traveling until we have to slow down.”

Giving Back with Gratitude

Although they have traveled the world, stamping their passports all across Europe, Asia and even the Himalayas, Newport Beach is home. Blessed by the success of their company, they wanted to give back to the community that gave so much to them.

Aware of the importance of having access to world-class care, Hoag was a natural choice for the couple. Ben joined the Hoag Hospital Foundation Board and currently serves on the Investment Committee. When they met Jeffrey Yoshida, M.D., program director of urologic oncology at Hoag Family Cancer Institute, Ben and Carmela knew he was someone with big ideas. And they wanted to help him make them a reality for men all over Orange County.

The Dus decided to make a \$2.25 million gift and establish the Benjamin & Carmela Du Endowed Chair in Urologic Oncology. “We liked the fact that Dr. Yoshida is forward thinking in that he wants to do more than simply treat patients, he wants to go beyond that with prevention, early detection and research,” stresses Carmela.

An Innovative Healer

One of Hoag’s 11 endowed chair holders, Dr. Yoshida is honored to be the first Benjamin & Carmela

Du Endowed Chair in Urologic Oncology. “Being appointed as an endowed chair is one of the highest distinctions a physician can receive, and I was shocked—and thrilled—when I learned about the Dus’ remarkable gift,” Dr. Yoshida says.

Dr. Yoshida added that the gift will allow him and his team to do the kind of comprehensive prostate cancer research and clinical trials typically conducted in academic research settings, and not community-based hospitals. Prostate cancer is the second-leading cause of cancer death in men. Even so, Dr. Yoshida explained, there is a wide spectrum of prostate cancers, ranging from indolent (non-progressive) to highly lethal forms.

“This gift will allow us to conduct comprehensive urologic cancer research including clinical trials, with the initial research focusing on ‘active surveillance’ of prostate cancer,” Dr. Yoshida continued. “We will be able to offer state-of-the-art imaging, biomarker testing and a clinical research platform to optimize this approach to prostate cancer management. This will not only improve our ability to monitor cancers, but it may also alleviate anxiety that men experience when on active surveillance. The Dus generous gift will take our vision and make it a reality.”

Ben and Carmela are very proud to serve Hoag and hope their gift will inspire others throughout Orange County to support our exceptional health care asset.

“Dr. Yoshida’s groundbreaking research on preventive medicine and care gives hope and healing to thousands of people with cancer,” shares Ben. “Carmela and I are honored that our gift will help him and Hoag expand his important work.”

ENDOWED CHAIRS

Highest Honors

Formal Endowed Chair Investiture Ceremony Recognizes Visionary Donors and Celebrates Hoag's Healers

An endowed chair investiture ceremony took place in October 2015 to recognize the appointments of Jeffrey S. Yoshida, M.D., and James T. Caillouette, M.D., as well as honor the transformational donors Carmela and Benjamin Du and Joan and Andy Fimiano.

More than 100 Hoag physicians participated in a traditional White Coat Processional in honor of the formal ceremony. During his remarks, Andy Fimiano quipped, "With all these 'White Coats' in the room, my blood pressure just went up 20 points."

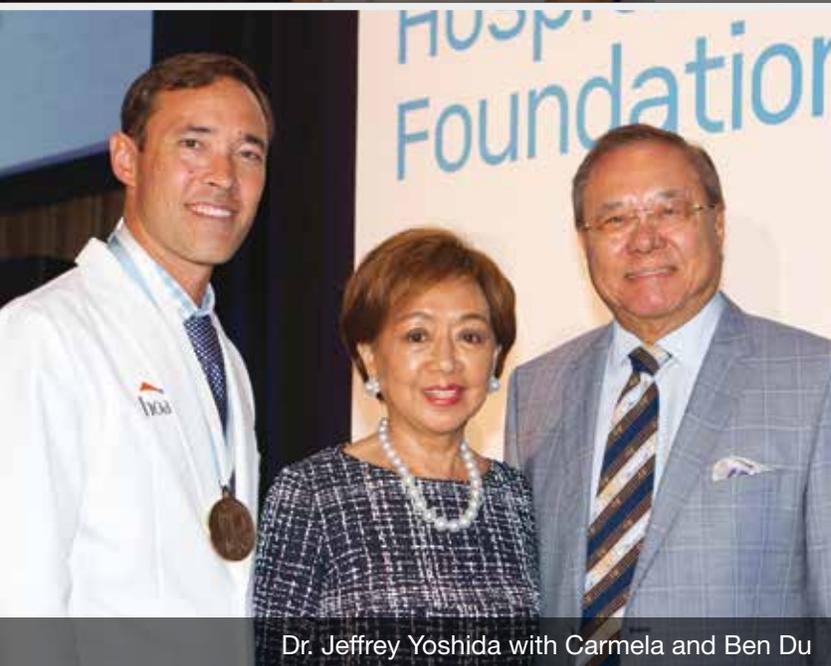
Dr. Caillouette was named the Joan & Andy Fimiano Endowed Chair in Orthopedic Surgery. The gift from Andy and Joan Fimiano recognized and honored Dr. Caillouette for his work in health care economics and reform, along with the design of next-generation hip and knee implants. The gift will enable Dr. Caillouette, chief strategy officer of Hoag Orthopedic Institute, to expand outreach, education, research, recruitment and treatment through Hoag's Orthopedic Education & Research Institute.



Seven of Hoag's 11 Endowed Chair holders. For a complete list, visit www.HoagPromise.org.



Andy and Joan Fimiano with Dr. James Caillouette



Dr. Jeffrey Yoshida with Carmela and Ben Du



Dr. Mel Silverstein with Sue and Bill Gross

Visibly moved by the honor, Dr. Caillouette recollected how the culture of innovation not only impacted his 28-year career at the hospital, but also saved the life of his son. In closing, he quoted Samuel Beckett, “Let us do something, while we have the chance.”

Dr. Yoshida was named the Benjamin & Carmela Du Endowed Chair in Urologic Oncology, made possible by the Dus’ \$2.25 million gift. As program director of urologic oncology at Hoag Family Cancer Institute, Dr. Yoshida plays a key role in the growth of site-specific programs for urologic malignancies, which include prostate, kidney, bladder and testicular cancers. He also is an expert in robotic surgery and has performed more than 1,900 surgeries to date. Following the ceremony, his parents, Naomi and Matt, embraced and thanked Ben and Carmela Du.

“We are honored to recognize Dr. Caillouette and Dr. Yoshida as the newest endowed chairs at Hoag,” said Flynn A. Andrizzi, Ph.D., president of Hoag Hospital Foundation. “Thanks to the commitment, determination, and the collective power of wonderful donors like the Fimianos and Dus, we can continue to provide the highest quality health care to the communities we serve.”

The ceremony also celebrated Melvin J. Silverstein, M.D., F.A.C.S., holder of the Gross Family Foundation Endowed Chair in Oncoplastic Breast Surgery which was previously announced and awarded. Dr. Silverstein shared that Hoag fellows who have trained with him have gone on to prestigious institutions like Johns Hopkins and the Cleveland Clinic.

Hoag now has eleven endowed chair positions, more than any community hospital. These important gifts enable the organization to expand and improve programs in cancer, cardiac care, memory loss and cognitive impairment, neurosciences, cardiovascular surgery, gastrointestinal disease, diabetes, breast care and women’s health services.

EVENTS



Celebrating Hoag Nurse Scholars and Supporters

More than 250 guests gathered at the Balboa Bay Club on November 17 for the annual *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.

During the program, Hoag Hospital Foundation President, Flynn A. Andrizzi, Ph.D., announced that CNCH raised more than \$2.5 million and funded a record 465 scholarships in FY 2015. He also had the honor of announcing that, as a lead gift in the Hoag Promise Campaign, the Crean Foundation committed \$3 million to establish the Crean Nursing Education Fund. This is the largest gift to date in support of the educational advancement of Hoag's nursing staff.

Roots that Run Deep

During the luncheon, CNCH announced that it is honoring long-time Hoag nursing supporter, Jim Newkirk by inducting him into the CNCH Hall of Fame. Hoag Hospital Foundation board member, CNCH Committee Member and Hoag Promise Campaign Leadership Council Member, Jim Coufos presented the honor to Jim Newkirk. During his introduction, he spoke from the heart about his good friend and golf partner.

Jim Newkirk shared that his connection to Hoag goes back to its earliest days when his mother, Alta Newkirk joined the first group of hospital employees as a nurse's aide in 1952. Alta spent the next decade working tirelessly in the hospital nursery and in the "Grace Wing," named for Grace E. Hoag.

To celebrate their mother's long association with Hoag, Jim and his late sister Patricia, generously established the Alta Newkirk Nursing Scholarship Fund. Their gift has been used to fund nursing scholarships each year and will continue in perpetuity.



Overcoming the Odds

Guests enjoyed hearing from nurse scholarship recipient, Danielle Miller, R.N., B.S.N.,

M.S.N.-c. She shared her inspirational story of overcoming health issues to continue in the tradition of her grandmother, mother and aunt who were all nurses. A Hoag nurse for five years, Danielle is in the CSU Long Beach-Hoag Family Nurse Practitioner program.

"As a health care provider, your educational journey never ends, and this is one of the things I love most about the medical field," she said. "The generosity and support of the Hoag Hospital Foundation, Hoag and all of the individuals who have touched my journey along the way is an incredible blessing."

Since its inception in 2004, CNCH has raised more than \$27.5 million which has funded more than 1,200 scholarships awarded to Hoag nurse scholars for continuing education, training and advanced degrees.

We extend a special thank you to CNCH luncheon co-chairs Sharon Bridges and Marilyn McIntyre for all of their great work and generous 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.

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, 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. |

GIFT PLANNING

Ahead of Her Time

Margaret Richardson Has Always Done Things Her Own Way



A true trailblazer, Margaret Richardson made the decision to forgo the traditional route expected of women of her era. In the ‘man’s world’ of the late 1950s, she became the vice president and business manager for one of the nation’s largest Buick dealerships at the time.

She earned the respect of her peers when, being offered the job of business manager, she demanded and received the same salary offered to male candidates for the same job. “Since I was capable, I should be compensated appropriately,” says Margaret.

Margaret’s interest in accounting, along with her can-do spirit, was nurtured by her business-minded mother who owned and operated an independent grocery store. “I was raised in my mother’s store where I learned to count money at the age of five.” Later, Margaret worked her way up to become head accountant at the local Chevrolet dealership.

Confidence in her own business skills gave young Margaret the courage to leave her hometown of Sharon, Pennsylvania in 1947. Armed with \$200 in her pocket, and her knowledge of the automotive business, she headed for greener pastures in California.

After two decades of success on her own terms, Margaret met and fell for Howard Richardson in 1965. The two were married and went on to open and co-operate Howard Chevrolet in Newport Beach. Many

happy years of marriage followed before a ‘silent’ heart attack claimed Howard’s life in 1989.

These days, an active and vibrant Margaret can be spotted cheerfully mingling at Hoag events such as the Circle 1000 annual brunch. Unlike many in their 90s, Margaret shows no signs of slowing down. Computer savvy, she manages her finances, corresponds with friends and family and makes custom cards on her PC. She was even able to troubleshoot a recent printer glitch. “I just told the tech, I’m 94, so you need to speak slowly and clearly,” she laughs.

Strategic Philanthropy

Hoag Hospital Newport Beach is Margaret’s hospital. She raves about the treatment she received from physicians, nurses and staff who’ve seen her through a few procedures over the years. As a philanthropist supporting Hoag and other organizations that were important to both her and Howard, Margaret is very strategic about her giving.

“I started using charitable gift annuities as a way to offer my support while also creating an income stream for myself,” she says. “I hope that people will become familiar with this way of giving. It’s such a good investment, both for the donor and for Hoag.”

When deciding where to direct her gift, Margaret chose the Mary & Dick Allen Diabetes Center. “Like a lot of people, I have developed Type 2 diabetes as I’ve matured,” adds Margaret. “I appreciate what the center is doing for people living with diabetes, and I know my gift will make a difference.”

If you would like more information about incorporating charitable gift annuities into your estate planning, 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



Why a Comprehensive Campaign?

While very successful, our pre-Hoag Promise Campaign fundraising programs were somewhat episodic. In other words, we've been very good at raising money for specific initiatives and institutional needs. The community was steadfast in its support and, as a result, that approach worked very well for a very long time.

Going forward, Hoag is being called to do more, innovate more and deliver more value with less traditional resources. New demands require a new approach. Hoag Promise, Our Campaign to Lead, Innovate & Transform is something different than you've ever seen before from Hoag. The process of launching Hoag's first ever comprehensive campaign called on visionary Hoag clinical leaders to focus their energy and attention on how Hoag can be better in the future. Not iterative, year-over-year change, but true transformation.

We asked them to take the long view. We asked them to collaborate like never before. We asked them, "What can Hoag be if we put all limitations aside?" They answered the call. They've created a vision which we've translated into a set of long-range strategic fundraising priorities. These priorities collectively represent an unprecedented elevation and integration of care.

Then we began to engage our Hoag community. As reported on page 7, donor support of \$331 million, including \$127 million from Renaissance Hoag fundraising efforts, puts us a little more than half-way to our \$627 million campaign goal. The campaign represents much more than meeting the financial goal; it will assure Hoag's ability to deliver the next generation of care while maintaining and enhancing the Hoag experience for every patient and family. This won't happen without you.

Our more than 300 Hoag Promise Campaign volunteers are working with the Hoag Hospital Foundation team to reach out to the community on behalf of the campaign. These are your friends, neighbors and colleagues. Please respond to them and engage with them. They can help you match your philanthropic passion with one of the many Hoag Promise Campaign priorities.

I'm pleased and encouraged by the response to the public launch of the Hoag Promise Campaign. We are blessed to have a community full of generous people who feel so strongly about their convictions that they are moved to take action. The ongoing partnership between Hoag and the communities we serve is resulting in a level of care as fine as any you'll find in the country.

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*We wish you and yours a healthy and
happy holiday season and a prosperous New Year!*

