

# DIMENSIONS

A FINANCIAL AND CHARITABLE PLANNING GUIDE

## IN THIS ISSUE:

A Gift for the Future

Road Trip: Plan for Your Life's Journey

Waves of Benefits

Transformational Gift from the Sun Family Foundation

## A GIFT FOR THE FUTURE

When it comes to grateful patients, Bob Juneman and his wife Ginger are some of the most. They made an impactful estate gift to Hoag to show their appreciation for the exceptional care they've both received over the years. "I have had five major surgeries at Hoag, and all of them with excellent outcomes," Bob said. "That's what Hoag is known for, and I would like that level of care to stay that way."

It was in 2005 when Bob was rushed to the Joan & Andy Fimiano Emergency Pavilion at Hoag Hospital Newport Beach that the Junemans first experienced Hoag care. For someone who'd never stayed in a hospital before, Bob was impressed by the attention and compassion from physicians and nurses and the ease he felt with them during a critical time. "I just can't say enough about the competency and the care of everyone," Bob said. "I've been impressed with so many people at Hoag."

In his friend and former colleague, longtime Hoag supporter Otis Healy, Bob found a guide who would enlighten him further about Hoag's vision for the future. He learned that the future involved the growth of services in Irvine, a goal that continues today. They were impressed by Hoag's mission to deliver its trademark care to more communities.

Soon after, Bob joined the Hoag Irvine Campaign Advisory Committee and became involved with shaping its future. In 2014, Bob and Ginger decided to make an estate gift of \$1 million to support Hoag Health Center Irvine. Though at first reluctant to be recognized with their name on a building, the



Ginger & Bob Juneman Pavilion has since resulted in some recognition they hope will inspire others.

"Periodically, I'll get a call from friends asking who the best doctor at Hoag is for some condition," Bob said.

"He's an ambassador," Ginger said with a laugh. "We've run into people who have seen our name at the building, and they felt good that they'd seen a familiar name." Bob and Ginger hope their gift will help ensure Hoag maintains the excellence they've come to appreciate and rely on.

"This gift was made because we had those good experiences. We want people to have the same care we did," Bob said.

"Or even better," Ginger added.

# DO YOU HAVE A PLAN FOR THE FUTURE?



We look forward to helping you create a plan that addresses your unique needs and goals at every life stage.

Take advantage of a great resource to help you in your planning. Our website includes a number of valuable tools, including informative videos, the online Wills Planner and a downloadable guide to planning your will or trust.

To download your free wills guide, please visit our website at [HoagHospitalFoundation.org/GiftPlanning](http://HoagHospitalFoundation.org/GiftPlanning).

If you would like to get started creating or updating your charitable plan, please give us a call at (949) 764-7206 or email [Julie.Heggeness@hoag.org](mailto:Julie.Heggeness@hoag.org).



## ROAD TRIP PLAN FOR YOUR LIFE'S JOURNEY

Knowing that life is one long road trip, the Hoag Hospital Foundation can help you plan your life's journey so you can experience joy and peace of mind. Ask us about the following destinations and what they offer you:



### **PAYABLE ON DEATH FORMS**

Without the formality of a will or trust, you can give significant assets to your family and favorite charitable causes by completing a simple form.

### **WILL**

Not having a will is like leaving on a trip with no destination in mind. Write or update yours and live every day knowing your values will be honored and your legacy remembered.

No matter how far into your life's journey or planning you are, it is never too late to consider the destinations above. You decide your trip based on your values and priorities. We can help you get there.

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## CHARITABLE GIFT ANNUITIES WAVES OF BENEFITS

### TRUST IN A SURE THING

There is something calming, reassuring and consistent about the warmth of the beach. No matter when you go, the waves and sand will soothe your body and calm your soul. However, you do not have to go to the beach to have the benefits of visiting one. Sometimes, a sure thing can be found much closer to home.

Hoag's charitable gift annuity is a sure thing that gives you comforting benefits for life. When you fund a charitable gift annuity with the Hoag Hospital Foundation:

- Hoag sends you fixed payments for life
- You receive a favorable payment rate
- You receive an income tax deduction and possible capital gains benefits
- You have the peace of mind of helping others

Best of all, when you fund a gift annuity, you receive the warmth, benefits and good feelings that come with helping our cause.

*Just like the waves  
that constantly wash  
the beach, Hoag's  
charitable gift annuity  
will bring you comfort  
and benefits for as  
long as you live.*

**Call Julie Heggeness at (949) 764-7206 or email [Julie.Heggeness@hoag.org](mailto:Julie.Heggeness@hoag.org)  
to begin your shore experience right away.**





## SUN FAMILY FOUNDATION SUPPORTS HOAG'S BOLD EXPANSION WITH TRANSFORMATIONAL \$50 MILLION GIFT

With a transformational \$50 million gift to Hoag, the Sun Family Foundation is helping usher in a new era of people-centered health care through Hoag's ongoing expansion in Orange County, providing increased access to Hoag's expert, compassionate care and state-of-the-art facilities.

While Diana and David Sun knew Hoag for its reputation in the region, their support grew exponentially after Diana's mother underwent brain surgery at Hoag's Pickup Family Neurosciences Institute. Now 95, Diana's mother was discharged from Hoag after a successful surgery and month-long stay. "During those agonizing days, I experienced firsthand how Hoag, as a nationally renowned hospital, operates as a well-organized, efficient, friendly and advanced organization," Diana said. Since then, Diana and David have become active members of Hoag's philanthropic community.

The Suns, who don't see themselves as philanthropists, simply hope their gift to Hoag inspires others to give

what they can. "Our gift is no more important or meaningful than any other gift to Hoag, no matter the amount, if it comes from the heart and is made in the hope of helping others," said David. For the entire Sun family, giving comes back to the importance of community. Irvine, where David and Diana have been residents since 1986 and where they raised their children, continues to hold a special place in their hearts. Now, the couple look to Hoag's physician and executive leadership to lead the way forward in meeting the diverse needs of the growing population with comprehensive, evidence-based care and innovation.

Hoag Hospital Foundation President Flynn A. Andrizzi, PhD, said, "This remarkable gift from the Sun Family Foundation will enable Hoag to dramatically expand the breadth of its outstanding health care services available to the community. It's also a testament to the unique relationship Hoag has built with the community—and how, together, we can make Orange County stronger and healthier."



### OFFICE OF GIFT PLANNING

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