

DIMENSIONS

A FINANCIAL AND CHARITABLE PLANNING GUIDE

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Hoag Hospital is
Highest Ranked in
Orange County



Dr. Miles Chang and Dr. Catherine Chang

SEEING IS BELIEVING

Hoag physician leader, along with his wife, made a gift to support Hoag's continued growth.

Dr. Miles Chang believes things when he sees them. In fact, he's built a career out of finding answers through visuals as a radiologist for Hoag. Since joining Hoag in 1995, one of those telling images has been the expansion of the radiology department and Hoag as a whole. "All we've done is grow. How many jobs are like that these days?" Dr. Chang ponders. "I want Hoag to continue that so we can keep benefiting people in the future." Dr. Chang's trajectory at Hoag has been one of dedicated physician, committed leader and, now, forward-looking supporter.

Dr. Chang and his wife Catherine, a physician in a private practice, have always been helpers: it's in their DNA, is how he puts it. "I work in the hospital. Cathy is in the

community, seeing patients and helping people," he said. "I see firsthand all of the things that actually help the community that come from philanthropy, such as the nurse navigators and the various Fudge family programs."

As Dr. Chang became more involved with leading not only his department but the greater vision at Hoag, he learned what it takes to keep a health network flourishing. He has served on Hoag's Medical Executive Committee, the Hoag Hospital Irvine Advisory Committee, the Physician Campaign Leadership Group during the Hoag Promise Campaign and is currently on Hoag's Board of Directors.

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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.

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.



THE THREE PARTS OF VICTORY

There is a lot we can learn from the power of training for a triathlon. To win, a competitor must be an excellent swimmer, bicyclist and runner. The athlete must master not only these stages of the race but also the transitions between these disciplines.

In life, we all have a finish line; we just never know when we will cross it. A triathlete's goal is to cross the finish line first. However, we don't have to finish first to have a successful future. **Everyone has the power to win.**

While a triathlete can be finely tuned and train for life, he or she may still only come in second place. Unlike the triathlete, we don't have to train, and there are no sacrificial diets or exercise regimens. **The cost for having an estate plan is minimal compared to the investment a triathlete makes, but the rewards are remarkable.**

TRIATHLETE PREPARING FOR A RACE	YOU PLANNING YOUR ESTATE
Preparation and training often pay off in the end.	Preparation and training always produce a sound plan.
Trains every day for years for a race that lasts a short time.	Meet a couple of hours with your attorney for results that last years.
Formula for victory: commit, prepare, complete.	Formula for victory: commit, prepare, complete.

Any competitor will tell you that to finish well, you have to have a plan, and that plan has **three parts:**



1. COMMIT



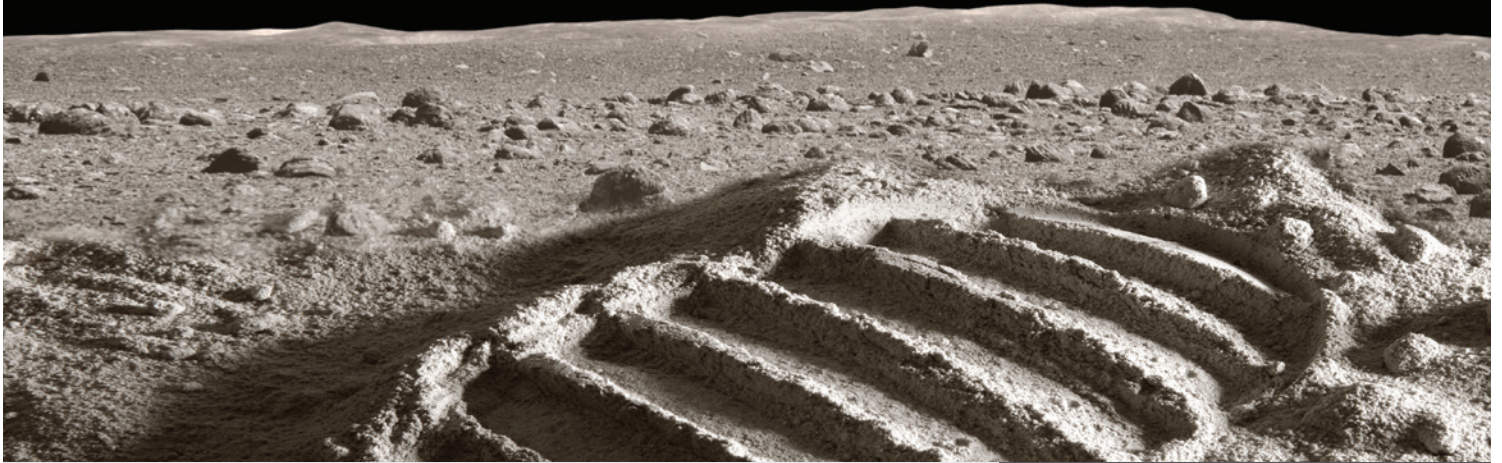
2. PREPARE



3. COMPLETE

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A LEGACY THAT STANDS THE TEST OF TIME



Even though astronauts last took steps on the moon in 1972, the imprint from each of their steps remains today. What a tremendous legacy! Those footprints will stand as a reminder of an accomplishment for generations to come.

What would you do if you had the power to do something remarkable today while making an impact that would last forever—the kind of impact that takes little time and costs you nothing? All of this is possible when you take a moment to review and **update the beneficiary designations** for your retirement and bank accounts.

The process of naming beneficiaries is easy. It gives you the power and control to tell your administrator who will inherit your accounts when you pass away. With a beneficiary designation, you still own the account and can continue to use it to meet your needs.

To name your beneficiaries, ask your account custodian, insurance agent or bank to send you a beneficiary designation form and then fill it out and return it. You can name family, friends or an organization like ours to inherit your account. When you leave a gift to Hoag, we will be able to continue our work.

If you have any of the following, then you have a great opportunity to leave your own lasting impact:



IRA, 401(k) or 403(b)
retirement accounts



Investment
accounts



Checking, savings
or CD account



Life insurance you
no longer need



TAX-WISE PLANNING TIP

The adjusted gross income (AGI) limit for cash contributions to qualifying charities remains increased because of the CARES Act until the end of the year. If you make a cash contribution to Hoag through December 31, 2021, you can elect to deduct 100% of your AGI.

SEEING IS BELIEVING

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"I'm incredibly inspired by the leadership I see. I see their dedication to the community," Dr. Chang said. "I see it from the top level, where people work to raise money, all the way to the level where you're the recipient of such great equipment or services because of that support."

Dr. Chang and his wife have made a charitable bequest to continue their mission of helping people long after they've left the exam rooms. Catherine says philanthropy has added another level of fulfillment to Dr. Chang's career on top of his clinical work. "Hoag has given so much to him that he wants to give back," she said. He hopes other physicians will be moved to think of supporting Hoag's future.

Though Dr. Chang wants his family's gift to benefit whatever area needs it most, he's hoping there will be more scholarships and educational opportunities for radiology staff. His family's gift to Hoag is not a recognition for himself, Dr. Chang said, but a provision for the next physicians, staff and patients.

"Hoag has always had the resources to support the type of work physicians want to do at the quality they want to do it. I think it's worthwhile to give back to ensure that continues."

To learn how you can give back, visit HoagHospitalFoundation.org/GiftPlanning

HOAG HOSPITAL IS HIGHEST RANKED IN ORANGE COUNTY FIVE YEARS IN A ROW

Due in large part to the innovative programs and best-in-class technology provided by philanthropy, Hoag was once again the highest ranked hospital in Orange County in the 2021-2022 *U.S. News & World Report*. This marks the fifth year in a row Hoag has achieved this level of recognition.

U.S. News & World Report evaluated more than 4,000 hospitals for their capacity to treat seven chronic conditions and up to 10 medical procedures. Hoag was one of only 11 hospitals to rank "high performing" in all 17 procedures and conditions.



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