

COMMITMENT TO SERVE

Former Hoag President and CEO Dr. Rick Afable and his wife, Sally, make a gift to support Hoag’s efforts to provide care coordination and advocacy for patients.

When Rick Afable, M.D., learned about Hoag’s Care Coordinator and Patient Advocacy Program during a Hoag Promise Campaign Steering Committee meeting, he couldn’t wait to tell his wife, Sally, about it. A physician, experienced health care administrator and former president and CEO of Hoag, Dr. Afable understands the complexities and challenges patients often face in navigating the medical system better than most. “The notion of care coordination and advocacy was and is sorely missing in health care,” says Dr. Afable. “For a community organization like Hoag to take the step of providing this, knowing that insurance doesn’t pay for it and knowing that it’s needed but not expected, really resonated with me.”

Sally, who has spent much of her life working with the elderly, readily agreed. “I would listen to their frustrations and their families’ frustrations in coordinating all of their health care needs. Individuals can be so fragile when they are ill and trying to care for themselves and the ones they love. It’s easy for them to get swallowed up by the system.”

The Afables were so inspired by Hoag’s efforts to do more for patients that they decided to make a generous estate gift in support of the Care Coordinator and Patient Advocacy Program.

Easing the Patient’s Burden

With the opening of Hoag Health Center Irvine – Sand Canyon in 2016, Hoag piloted the Care Coordinator and Patient Advocacy Program. The intention was to dramatically improve the patient experience by providing coordination, navigation and advocacy services. Hoag’s care coordinators schedule and coordinate appointments, act as an advocate and personal liaison for patients, assist with insurance authorizations, provide care itineraries,

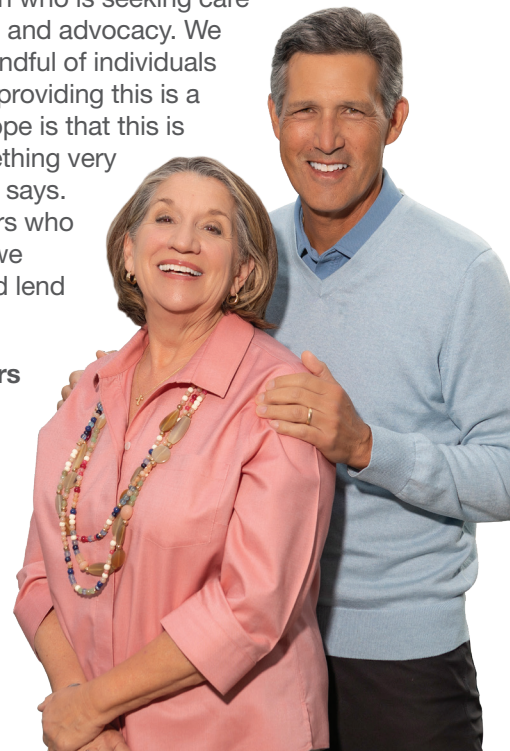
help remove barriers to care, educate patients about the insurance process and community resources and make navigating the health care system more manageable.

The pilot was so successful, it has grown into four full-time care coordinator positions, which have assisted over 7,000 patients to date at Hoag Health Center Irvine, Hoag Health Center Tustin Legacy and Hoag Health Center Foothill Ranch. The Afables look forward to seeing even more patients benefit. Hoag’s vision is to implement 10 care coordinators throughout Hoag’s network of health care centers.

“We think every person who is seeking care deserves coordination and advocacy. We know that having a handful of individuals at Hoag dedicated to providing this is a good start, and our hope is that this is the beginning of something very significant,” Dr. Afable says. “That will require others who are as passionate as we are to get involved and lend their support.”

For the Care of Others

The Afable’s passion for the program stems from a deep-rooted commitment to serving and caring for others. It has been the driving force behind everything they do.



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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 HoagPromise.org/GiftPlanning

If you would like to get started creating or updating your charitable plan, please give us a call at (949) 764-7206.

CORONAVIRUS AID, RELIEF AND ECONOMIC SECURITY ACT (CARES ACT)

Even in these trying times, Americans are showing they are among the most generous people in the world. Every day, we see stories of neighbors volunteering to help those in need and strangers performing random acts of kindness. Many are continuing their support of a broad array of charitable causes, even making larger charitable gifts in light of the current economic environment.

In response to the coronavirus pandemic, Congress passed the CARES Act, which includes several measures to enhance charitable giving. These options may help you maximize your charitable gifts, whether or not you itemize deductions for income tax purposes. Here's a summary:

1

Taxpayers are allowed an above-the-line deduction of up to \$300 for charitable contributions of cash by individuals. (This provision applies to most qualified charitable contributions but not to donor-advised funds.)

2

For charitable gifts of cash, the overall percentage of adjusted gross income (AGI) limitation is increased to 100% for individual taxpayers for tax year 2020. Gifts of appreciated assets are generally deductible up to 30% of AGI and may be combined with cash gifts up to the 2020 maximum of 100% of AGI. Excess amounts may be carried over for use in future years.

3

Those aged 70½ or older with an IRA may still make tax free qualified charitable distributions (QCDs), even though required minimum distributions are suspended through the end of the year.

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.



ARE YOU PLANNING TO **LEAVE YOUR IRA** TO YOUR CHILDREN AND OTHER HEIRS USING A STRETCH IRA PLAN?

If so, consider the benefits of using a testamentary charitable remainder unitrust to replace your obsolete stretch IRA plan.

Spreads out the income payments over the lifetime of your heirs

Provides income tax savings to the heirs

Allows tax-free growth inside the trust

Protects heirs

Results in no taxes being paid on the IRA when it is distributed to the trust

Leaves significant charitable gifts to support our cause

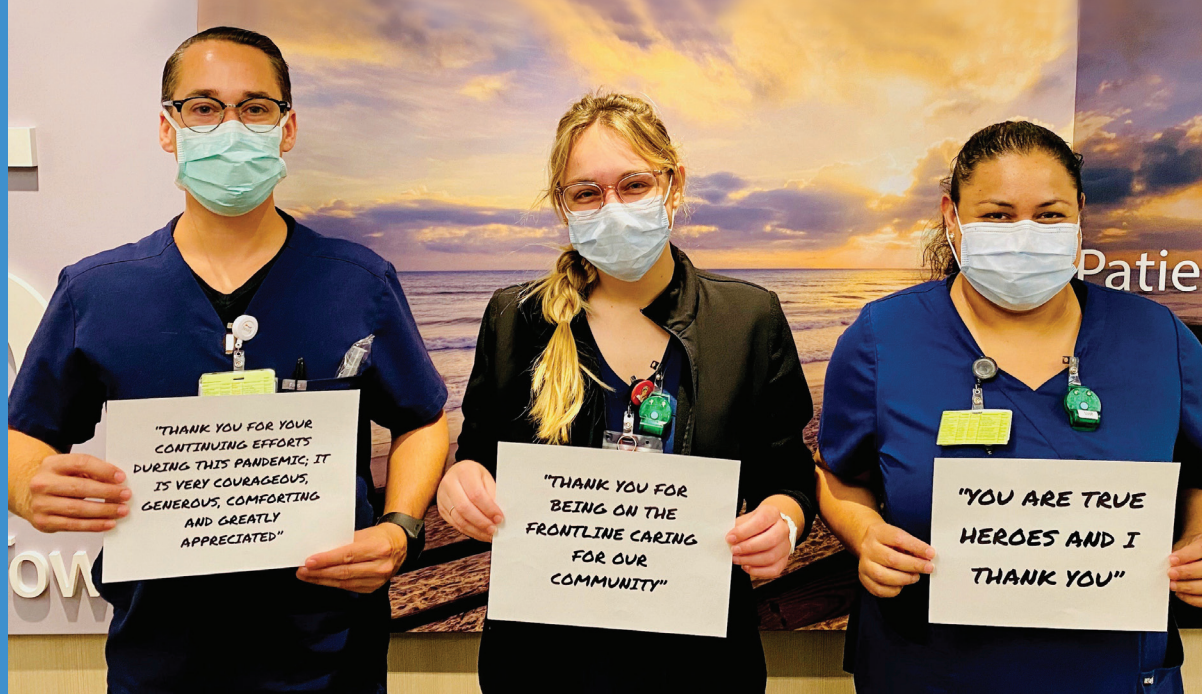
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Did you know the **SECURE Act**

has dramatically changed the tax law rules, substantially increasing the income taxes paid by your children on inherited IRAs?

For more information about a testamentary charitable remainder unitrust and how it can benefit you, contact us or visit our website.

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DONOR SUPPORT POSITIONS HOAG TO CONDUCT COVID-19 TESTING AND RESEARCH

Thanks to the support of our donors, Hoag’s Center for Research and Education (HCRE) has emerged as a leader in clinical research. As a result, Hoag is on a short and elite list of health care systems with the infrastructure in place to conduct clinical trials of various drugs and other interventions for COVID-19:

- Hoag was one of the top trial sites for the Gilead antiviral drug remdesivir. Our findings contributed to the FDA’s rapid approval for emergency use.

- Hoag is currently participating in the Mayo Clinic convalescent plasma trial and community-focused testing trials.
- Hoag has launched an antibody testing trial focused on our own health care workers to increase understanding of COVID-19 immunity.
- HCRE is in the preclinical stage with a local drug company of deploying a COVID-19 vaccine.

As Medical Director of Infection Prevention and Hospital Epidemiology at

Hoag, Philip Robinson, M.D., F.I.D.S.A., is leading the COVID-19 response for Hoag. “I and our entire Hoag team are very grateful to our community for supporting us as we conduct our response, including critical testing and research,” said Dr. Robinson. “Past and present donor support has positioned Hoag to contribute in a major way to the regional and nationwide efforts to mitigate COVID-19.”

Help fund Hoag’s COVID-19 research by visiting <https://covid19.hoagpromise.org/>.

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As president and CEO of Hoag from 2005-2013, Dr. Afable helped shape Hoag into the world-class organization it is today: one that serves the community by providing care that is second to none. Today, he leads Be Well OC, a public/private partnership designed to vastly improve the health

and well-being of those suffering from mental health and substance abuse issues in Orange County. Sally volunteers her time to teach Bible studies and help women through drug and alcohol recovery.



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