

Securing the Future

ENDOWMENT BENEFITS CHILDREN WITH DIABETES

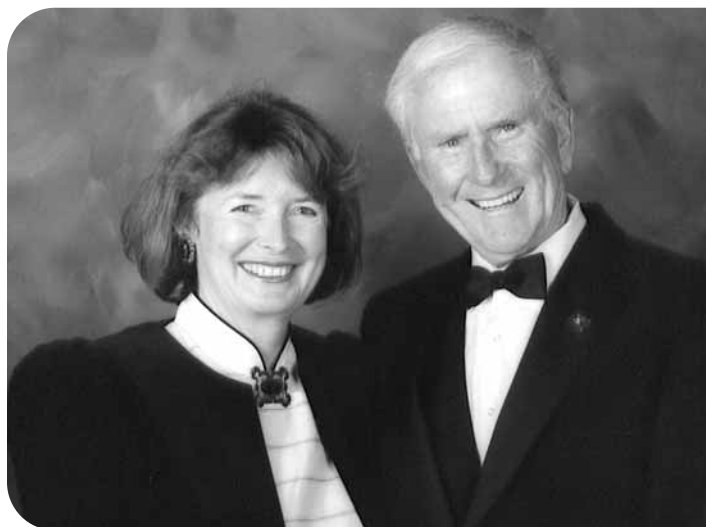
Thanks to the \$100,000 endowment created by The Robert & Helga Pralle Family Foundation, thousands of Orange County children who have diabetes will benefit tremendously from CHOC's diabetes program.

Endowments are a perfect way to provide continued support for vital programs at CHOC. The Pralle's daughter, CHOC Glass Slipper Guild member Kim Krotts, is a board member of The Robert & Helga Pralle Family Foundation. She designated funds to establish the first endowment for CHOC's diabetes program.

According to Kim, supporting a vital program while leaving a legacy was an easy decision. "After touring CHOC and meeting with Dr. Susan Clark, medical director of CHOC's diabetes program, I felt that creating an endowment was a great way to support an important program forever. Diabetes doesn't get as much support as other programs, and it is a growing epidemic," she says.

A financial endowment is a transfer of money or property to an institution with the stipulation that it be invested and the principal remain intact while the interest is used. This allows for the donation to have a much greater impact over a long period of time—because of compound interest—than if it were spent all at once.

Kim resides in Newport Beach with her husband, Jason, and their two daughters Olivia and Charlie. Grateful for her healthy children, Kim feels lucky to



Helga and Robert Pralle

have CHOC in Orange County and considers it a valuable resource that is worthy of community support.

"Although dad is no longer with us, he loved to travel, enjoyed sports and really liked to exercise," Kim says. Robert would certainly be proud that his daughter is supporting a program that encourages physical activity and helps children who have diabetes.

*To learn more about endowment funds
or other gift planning vehicles,
please call Jeri Stathis, CSPG, CHOC
Foundation at (714) 532-8690,
or send an e-mail to jstathis@choc.org.*



ESTATE AND PLANNING Workshops

NOV. 14

My Healthcare Wishes: planning for incapacity and selecting trustees who will make decisions when you cannot. Dr. Vijay Dhar will be the guest speaker.

FEBRUARY 2008

We will discuss endowments and give tours of the new sixth floor Pediatric Intensive Care Unit.

APRIL 2008

Come hear about new tax laws and updates.

Join Jeri Stathis, CSPG, Manager, Trust and Estate Gifts, along with Dan Parr, Financial Gift and Planning Consultant, to gain valuable information that can assist you in your retirement planning. Seating is limited; please call (714) 532-8690 to book your reservation.



MESSAGE FROM THE VICE PRESIDENT

By Dr. Maria Minon, Vice President of Medical Affairs and Chief Medical Officer

AS WE STRIVE to meet the ever-increasing healthcare needs and challenges of the children in our community, endowments will play a key role in providing a solid foundation for our long term financial stability. CHOC's vision is to become a nationally recognized children's hospital—a shining example of Orange County's desire to provide the best for its children.

Endowed chairs—funding associated with physicians who make outstanding contributions in teaching, research and the provision of exceptional patient care—will go a long way toward making that vision a reality. An endowment is a forever gift—a long-term fund established by a donor to support an area of specific need or physicians who have distinguished themselves in their respective fields.

Donating to endowed chairs gives you the opportunity to contribute to a worthwhile cause, while enjoying the knowledge that you have contributed to a physician who elevates patient care for Orange County's children. Strong endowments will enable CHOC to move forward with plans and projects, knowing that permanent resources are available to support groundbreaking research and innovative teaching programs. I ask that you consider joining with us in ensuring the future of outstanding care for the children of Orange County.



NEW INTENSIVE CARE UNIT FOCUSES ON SAFETY, FAMILY-CENTERED CARE

ON SEPTEMBER 19, CHOC opened its brand-new, state-of-the-art Pediatric Intensive Care Unit (PICU) and Cardiovascular Intensive Care Unit (CVICU) on the sixth floor. The new unit houses 30 private rooms, increasing CHOC's capacity to care for Orange County's most critically ill children.

The unit is innovative in its design, featuring private patient rooms with sofa/sleep beds and separation curtains for parents; satellite nursing stations with bedside charting; and advanced equipment that gives caregivers 360-degree access to patients. Rooms for on-call physicians are also located in the unit.

The CVICU is a 12-room designated area within the PICU. It includes two fully equipped procedure rooms that enable physicians to perform lifesaving surgery

on children who otherwise could not be transported.

According to Phyllis Nelson, executive director of ancillary and general services at CHOC, "the new PICU and CVICU truly are an example of family-centered care, innovation, technology and safety coming together in the creation of a beautiful, state-of-the-art intensive care facility."



ENDOWMENTS PROVIDE A PERMANENT SOURCE OF INCOME FOR CHOC

OUR FINANCIAL NEEDS are constant and always growing. To ensure the stability and future success of CHOC, you may want to consider the benefits of an endowed fund, which would support one of our many programs or centers of excellence. But have you ever wondered how an endowment actually works?

BENEFITS OF ENDOWMENTS

In addition to providing financial stability, establishing an endowment allows you to name the fund and gives CHOC an opportunity to recognize your generosity in perpetuity—a gift that will make a difference for generations.

Many donors use an endowment to memorialize a family member or a special individual, or to say “thank you” to a loved one or an organization. This could be a research fund in the name of a friend who passed away from a specific disease, or in honor of a loved one who volunteered at the hospital.

The gift to create the endowment can be made from cash, stock, life insurance, real estate or other assets, and only the earnings from the investment are used for the purpose you designate.

An endowment is a permanent investment in CHOC and our commitment to providing the best healthcare possible to the children of Orange County. It truly is a gift that keeps on giving.

If you are interested in endowing a program or service at CHOC, please contact Jeri Stathis, CSPG, Manager, Trust and Estate Gifts, at (714) 532-8690 or jstathis@choc.org.

REMEMBER TO REVIEW AND UPDATE YOUR WILL WHEN:

- Tax laws change
- You move to another state
- Your marital status changes
- Your executor can no longer serve
- You want to change guardians
- Your financial status changes
- Your heirs need to be changed
- You inherit property
- Your charitable interests change

PLANNED GIVING AMBASSADORS HONOR ROLL

CHOC IS HONORED

to have many planned giving ambassadors in the community who are dedicated to helping us attain our vision of achieving national recognition as a premier children’s hospital. These ambassadors are volunteers who have given their time and expertise over the years in support of the hospital. We are proud to work together with the following individuals to develop solutions to meet your estate planning needs.

Barry Allen
James Anderson
Donna Bashaw
Robin Bently, JD
Scott Bourdelais
Matt Brown, Esq.
Roy Brown, JD
Donald Campbell
Doug Cobb
Sonny Collin
Doug Corbin, CSPG
John Deily
Charles De Lao, JD
David Emmes
Doug Freeman, JD
Albert Geigle
Paul Glowienke
Victoria Gray

David Harrison, Esq.
Richard Hilger
Jeffry Hipshman
Donald Hunsberger, JD
Howard Isador
Bruce Jones
Robert Kacer
Gregory Kaltenbach
Alice Marshall
Charles McLucas, Jr., CEP
Craig Millet
Robert Morris
Nella Webster O’Grady
Dan Parr
Dennis Parrett
Kristen Powers
Cutis Rach
Scott Richmond

G. Edward Siebel, Jr.
Krystine Solomon
Donna Tonkan
Gary Van Arnam
Cynthia Vandenberg
Jillyn-Hess-Verdan
Robert Waltos Jr.,
CLU, CHFC, CFP, MSM
Rochelle Ward
Tucker Watkins
George Yackey, Jr.
Thomas Yocis, JD



Specific Bequest to the CHOC Foundation:

A specific bequest gives an item or piece of property to the CHOC Foundation. Such bequests are fulfilled first, before cash and residuary bequests. If the donor disposes of the specified property during his or her lifetime, there will be no bequest to the CHOC Foundation.

I give _____ (describe asset) to the CHOC Foundation, a not-for-profit, IRS designated 501(c)(3) corporation; 455 S. Main Street, Orange, California 92868, to further the mission and vision of Children's Hospital of Orange County (or specify the designated department, program or fund).



455 S. Main St.
Orange, CA 92868
(714) 532-8690
(714) 532-8380 Fax
www.choc.org

For more information, please contact:
Jeri Stathis, CSPG
Manager, Trust and Estate Gifts
jstathis@choc.org

MAKE YOUR GIFT COUNT: STRATEGIES FOR YEAR-END GIVING

THE END OF THE YEAR is a time to reflect on the past and anticipate all that the future holds. 'Tis the season that the philanthropist in all of us emerges. We are grateful for the blessings and good fortune of our family, and we wish to share with those individuals and causes that need our support.

Completing a charitable gift by December 31 demonstrates your commitment to making a difference through helping others—and can reduce your federal income taxes in the current tax year. CHOC accepts many different types of assets, allowing you to enjoy significant tax savings while supporting our mission.

ASSETS AND NEEDS

Cash, real estate, personal property and stocks are among the most popular charitable gifts; gifts of appreciated

property that have been owned for more than one year offer special tax breaks.

Making a charitable gift of stock to CHOC is convenient, easy and economical. When you make a gift of stock to us, you receive a charitable income tax deduction for the entire market value of the stock, including capital appreciation, and avoid the capital gains tax you would have owed if the stock had been sold.

Also, don't forget about the IRA opportunity available for this year. The Pension Protection Act of 2006 allows individuals aged 70½ or older to make gifts now to qualified charitable organizations like CHOC using funds transferred directly from their IRAs. Furthermore, you will not have to pay taxes on the amounts transferred. You can transfer any amount you desire up to \$100,000 on or before December 31, 2007.

IT'S NEVER TOO EARLY TO SHOW SUPPORT

Although she can't remember it, 10-year-old Hope Saxon knows the doctors and nurses in the Neonatal Intensive Care Unit (NICU) at CHOC at Mission helped save her life. Born at just 1½ pounds, she spent many weeks in the unit until she was healthy enough to finally go home. Now she has found a way to give back.

Hope's family has a policy on how she can use her allowance. One-third goes to savings, one-third is for personal spending and one-third is designated for a philanthropic organization of her choice. After seeing pictures of herself in the NICU and talking with her parents about the lives saved at CHOC, Hope knew exactly where she wanted her philanthropic funds to go.

Earlier this year, Hope visited the CHOC at Mission NICU to reunite with the nurses who cared for her. After touring the unit, she was so inspired that not only did she give a year's

worth of philanthropy money to CHOC, but she gave some of her own spending money as well. With a smile on her face, Hope proudly presented a \$115 check to the hospital. "I wanted to give to CHOC at Mission because they saved my life," Hope says.



Philanthropist Saxon