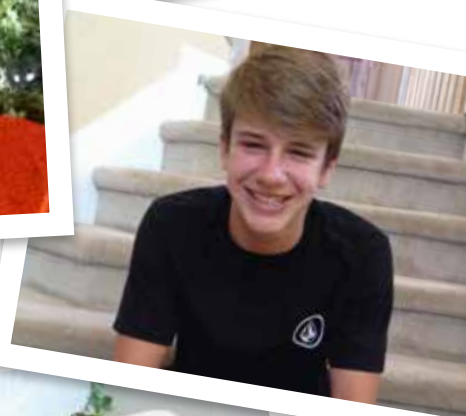
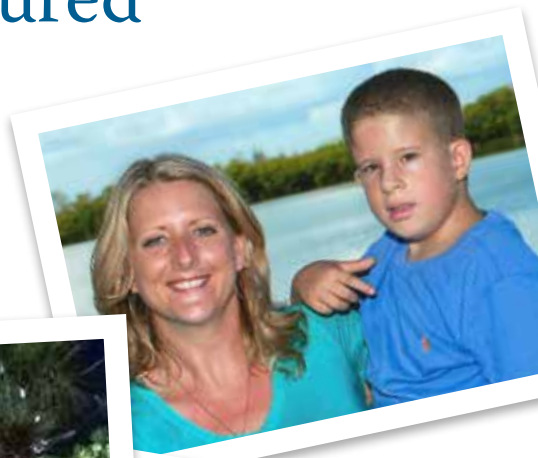




HEALTHWELL  
FOUNDATION®

When health insurance is not enough.®

# Relieving the financial burden for America's underinsured and their families





## OUR MISSION

The HealthWell Foundation reduces financial barriers to care for underinsured patients with chronic or life-altering diseases.

“This is my six-year-old son, James. When James was thirteen months old he was diagnosed with Prader-Willi Syndrome (PWS), a complex genetic disorder affecting appetite, growth, metabolism, cognitive function and behavior and is typically characterized by low muscle tone, short stature, cognitive disabilities, problem behaviors, and the hallmark characteristics – involuntary and uncontrollable chronic feelings of hunger and a slowed metabolism that can lead to excessive eating and life-threatening obesity. Those who have PWS need medication and strict external controls, including padlocking access to food, to maintain normal weight and to help save their lives.

Not only does the medication give James the physical strength needed to maintain daily activity, it also helps with cognitive function, gross and fine motor skills and body composition. James has been on his therapy for almost two years now. When he was two years old, he could only walk for brief periods of time, then he would have to use a stroller because he simply was too tired to walk. As a result of his medication, today James and I walk four to six miles a week. Without the therapy, this exercise program would not be possible. I have nothing but pure gratitude for the HealthWell Foundation and to the people who donate to the Pediatric Assistance Fund. Without your generous assistance, James would not be as strong as he is today, physically or mentally, nor would we be able to share our walks together.”

—Traci (*James’ mother*)

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## A Year of Changes, Challenges, and New Opportunities for Children

For the HealthWell Foundation, 2013 was a year like every other since opening our first fund in 2004, as we continued our mission of assuring adequate financial protection for underinsured Americans. HealthWell is proud to be a trusted voice in copayment assistance over the past decade, helping underinsured patients with their out-of-pocket costs for life-changing medical treatments. 2013 was also a year of change for HealthWell and challenges within the larger landscape of health care in the United States, especially as Americans began enrolling in new health insurance plans under the Affordable Care Act (ACA).

One change brought strong, experienced leadership to the helm, as Krista Zodet became HealthWell's president. While this is a new role for Krista, she is well known to HealthWell's staff, donors and board. Krista has played key roles within HealthWell since its early days, offering a level of knowledge, creativity, guidance and commitment that made her the perfect candidate to lead HealthWell into the future of copayment assistance.

Another change during 2013 was the launch of two new funds: the first to assist patients with Peyronie's disease and the second is the HealthWell Pediatric Assistance Fund®, which we opened in response to growing demand from families in need. Thanks to the generous support of individual donors, our Pediatric Assistance Fund helps ensure that families with children who have chronic conditions—including cerebral palsy, cystic fibrosis, or juvenile diabetes—are not forced to choose between paying bills and affording quality health care.

*For working families with inadequate insurance, treating childhood illnesses may mean hundreds or thousands of dollars a month in out-of-pocket costs.*

2013 was also a year of challenges as the country readied itself for the implementation of insurance reforms that would become law in early 2014 under the ACA. While the ACA will allow millions of previously uninsured Americans to obtain health care coverage at more affordable rates than ever before, it will also increase the number of patients who can't afford to pay for the therapies their doctors prescribe, especially as the health care system continues to shift cost burdens to individuals. Even employer-sponsored health insurance has become a financial challenge for many Americans as employers pass more and more of the cost to employees.

As the ACA is more fully implemented in 2014 and more people become insured, HealthWell expects the need for copayment assistance to increase. That's why we are so grateful to the biopharmaceutical manufacturers and other companies that are our

main sources of financial support. Their growing commitment to HealthWell—along with that of individual donors—is matched by HealthWell's pledge that 100 percent of every dollar donated goes directly to patient grants and services.

In 2013, HealthWell awarded more than \$72 million in grants, making a real difference in the lives of our grant recipients. Donations at any level make a difference. For example:

- \$10 covers the cost of a child's diabetes test strips for one month.
- \$25 helps a cancer patient pay for anti-nausea medicine.
- \$45 supports a child's pituitary hormone treatment for one week.
- \$50 covers the co-payment for the first course of lung cancer treatment.
- \$75 covers the cost of a child's lesion treatment for immunosuppressive disease for one month.
- \$100 supports anti-rejection treatment for an organ transplant patient.
- \$250 covers a child's life-saving asthma medication for a month.

## Underinsurance in America

- 30 million people in the U.S. are underinsured
- 80 million are unable to afford the health care they need
- 75 million struggle with medical debt

Source: Commonwealth Fund, April 2013

## What Do People Do When They Don't Have Adequate Health Insurance?

- Delay mortgage and utility payments to cover the cost of therapies.
- Cut back on necessities such as food.
- Delay or skip doctor appointments.
- Forgo recommended medical tests or treatments.
- Cut pills in half or rely on home remedies.

HealthWell is proud to be among the health care industry leaders who are helping to cover out-of-pocket costs to patients and to increase access to health care. And we're proud to showcase the real-world, innovative efforts of others who are working toward similar goals. To that end, we launched a blog in 2013: [RealWorldHealthcare.org](http://RealWorldHealthcare.org), which celebrates success stories throughout the health care delivery chain. The blog serves as a resource for health journalists looking for evidence of what works to reduce costs, increase quality of care, and improve treatment compliance. We are also reaching out to patients, donors, health care providers and others through our Facebook page and Twitter feed, which allows us to share breaking HealthWell news and to encourage conversations about the ever-changing health care landscape.

In addition to our enhanced social media presence, HealthWell made a number of improvements in 2013 to simplify our operations. We added new tools to our website and enriched our patient and provider portals with automated status and payment reminders. We also added a limited look-back period at the front of each grant to assist with costs incurred by patients prior to applying for a HealthWell grant.

As HealthWell looks toward 2014, we are resolute in our mission to continue providing financial

assistance to help patients pay out-of-pocket health care costs, including prescription drug coinsurance, copayments, deductibles, health insurance premiums and others. We know we cannot achieve our goals without the financial support of companies and individuals who care about others in need.

To those who donated to HealthWell in 2013, we offer a very sincere thank you; we are grateful for your support and for helping us provide hope and help to thousands of patients in need.

To those who are considering supporting HealthWell, we invite corporations and individuals to help us meet the ongoing demand for our assistance and to ensure that no patient—adult or child—goes without essential medications because they cannot afford them.



“Thank you for making another year of treatment possible for Mason.”

—Sara  
(Mason's mother)

# From Our Board Chair

2013 was a year of change and progress for HealthWell. We marked a change in leadership through the appointment of Krista Zodet as our new president. Krista has been with the Foundation since 2005, playing key roles as we implemented more and more effective ways to pursue our core mission. Krista's transition into the role of president was seamless in light of her unwavering dedication to what we do, her deep knowledge of how we do it, and her creativity in devising ways to do it better. The "what" and the "it" are all about assuring adequate financial protection for insured Americans to meet their cost-sharing obligations. Krista assumes this role at a time of continuing challenge for the Foundation and charitable patient assistance programs overall.

As we prepared for January 1, 2014, the date on which most of the key insurance reforms of the Affordable Care Act were due to be implemented, we continued to assess the Act's impact on our beneficiaries. As expected, the need for our support did not abate. We fully expect that this will continue to be the case as the Act is more fully implemented in 2014. At the same time, the focus on cost containment as access expands becomes more and more intense and is affecting the health care system on many levels simultaneously: efforts to shift cost of care burdens to individuals, within what is permitted under the Act, will continue apace, and there is increased cost pressure, and financial stress, on the drug manufacturers that remain our principal sources of financial support. More demand coupled with decreasing resources is an unenviable challenge, but one that we are confident we can successfully meet. While the health care system is undergoing potentially radical transformation, we must remain focused on assisting those individuals who need our help in weathering what we hope will be a transition to a more efficient and equitable world.



As they are an integral part of assuring our continuing ability to perform our critical role, we are deeply grateful to our corporate and individual donors. We continue to diversify and broaden our financial base as current and potential donors recognize the importance of what we do, how efficiently we do it, and how we follow through on our commitment that 100% of every donated dollar goes to patient grants and services.

As Chairman of the Board, I would like nothing more than for our mission to be fulfilled and for insured Americans to independently possess the financial capacity to access the medical treatments they need. But, alas, that will not be the case for the foreseeable future. So the need for what we do will go on, and we have more work to do to be more creative about how we most effectively satisfy our mission. Whether through developing innovative funds, such as our Pediatric Assistance Fund, or further diversifying our donor base through direct mail, social media and the like, we will remain steadfast in pursuing our mission, but we will continue to need your generous support. We thank you for what you have done and look forward to partnering with you as we, together, do even more to meet the current challenges of assuring adequate financial access to health care.

Warm wishes,

A handwritten signature in black ink that reads "Stephen M. Weiner". The signature is written in a cursive, slightly slanted style.

Stephen M. Weiner  
Board Chair

## 2013 HIGHLIGHTS

- Granted \$72,087,597 in awards to 24,475 patients.
- Enhanced our grants management services through the implementation of:
  - ✓ a 12-month rolling grant cycle, which allows patients one full calendar year prior to re-applying
  - ✓ new, real-time, automatic reminders to advise patients and providers when documentation is due
  - ✓ enhanced portal capabilities to allow pre-approved grant recipients to view a list of documents still required to approve their grant
- Handled more than 202,300 calls and processed 31,369 applications and 118,990 claims.
- Announced a change in leadership through the appointment of Krista Zodet as HealthWell Foundation president.
- Launched a new program to provide copayment assistance to patients with Peyronie's disease.
- Opened the HealthWell Pediatric Assistance Fund® to assist children 18 years old or younger living with a chronic or life-altering condition that their families are struggling to treat due to cost. Through this fund, we provide financial assistance to families so their children can start or continue critical medical treatments, regardless of disease type or condition.
- Launched the Real World Health Care ([www.realworldhealthcare.org](http://www.realworldhealthcare.org)) blog, a one-stop resource for journalists and others interested in our evolving health care system. The blog, sponsored by HealthWell, draws on the practical knowledge of health systems and health care professionals from diverse fields who understand patient needs and the challenges facing those who often have to choose between paying their medical bills and putting food on the table.
- Spread our message with more than 200 million media impressions in news outlets, including *USA Today*, Yahoo!, *Boston Globe*, *San Francisco Chronicle* and *Washington Business Journal*.



“Our daughter, Anna, was born with a birthmark on her face and scalp. A CT scan of her head confirmed the diagnosis of Sturge-Weber Syndrome, a rare disorder affecting the brain. When she was just 3 weeks old, she had her first set of seizures. It was terrifying to see her little body so out of control. She was admitted to the hospital and started on medication. The doctors were able to control the seizures, but never for too long. We changed medications, avoided activity that might over-fatigue her, struggled through specialized diets and prayed for a cure.

Anna was scheduled to undergo a radical surgery to remove the diseased half of her brain. We knew this could offer her a future without seizures, but we also knew the incredible cost we faced.

With the help of the HealthWell Foundation, Anna had her surgery. She is back home seizure-free—healing and growing. Our family has been able to focus our attention on Anna’s recovery, knowing the financial burden has been reduced.

We are so grateful for the financial support HealthWell has offered to us. With their help, we are able to celebrate the wonderful little girl God has blessed us with and we look forward to her bright future.”

—**Mary** (*Anna’s mom*)

“Our son, Alejandro, now almost two years old, was diagnosed with Cystic Fibrosis (CF) when he was six weeks old. Alejandro is a twin and we were thrilled to welcome two new babies into our family. Along with our excitement, there were many sad times because we were scared of the unknown, CF, and our biggest fear as parents came true with his diagnosis. He has a chronic illness which can be managed somewhat, but there is no cure. CF requires Alejandro to take many medications and breathing treatments. His doctors prescribed medication during the RSV season. He was prescribed one shot per month for a total of five shots from November through March. Our out-of-pocket cost is \$750 per shot, which is a huge financial burden as we are a family of five children and two adults.

We applied to the HealthWell Foundation for financial assistance in order to be able to pay the copayment for Alejandro’s treatment. We also contacted the manufacturer of the drug but, unfortunately, having CF does not make you eligible to receive financial support and we were not able to qualify for assistance through their program. Not being able to afford medication for our child is devastating and extremely frustrating. This is why we are so thankful for the Pediatric Assistance Fund through the HealthWell Foundation. Without a grant, we would not have been able to afford this extremely important medication for Alejandro. Receiving help was heartwarming because, although the contributors to the fund do not know our son, they were willing to donate money to ensure that a child who is in need of medication receives it. On behalf of Alejandro and our family, we would like to thank all of those kind people who donate their hard-earned money for children like Alejandro who need extras in order live.”

—**Ruben & Thelma** (*Alejandro’s parents*)





# From Our President

As HealthWell Foundation's new president, I'm proud to lead HealthWell through the changing health care landscape. Having worked within the organization for more than eight years, I've seen the difference HealthWell has made in helping patients receive the medical care they desperately need. My vision is for HealthWell to serve as the bridge for insured patients to improve their health outcomes by helping them access medical treatments they otherwise could not afford.

Since opening our first fund in 2004, HealthWell has been a trusted voice in copayment assistance. Our commitment to assist underinsured patients with out-of-pocket costs for life-changing medical treatment remains the cornerstone of our operations. As more Americans obtain health care coverage under the Affordable Care Act—increasing the number of patients who can't afford to pay for the therapies their doctors prescribe—the need for assistance is more critical than ever.

During 2013, we implemented innovative programs to meet the growing needs of those we serve, including more children. We were excited to launch HealthWell's first-ever Pediatric Assistance Fund in response to the increasing requests from parents who urgently require access to critical treatments for their child and have run out of options. With this fund, families with sick children are able to relieve the weight of expenses that otherwise are hanging over their heads. They can start or continue critical medical treatments regardless of their illness.

This program is unique because it is not disease-specific and the funding was made possible by the very patients who have been touched by our work and wanted to 'pay it forward' to help other families in need. Within a few months after opening the fund, we had assisted more than 20 families in need. We are grateful to the individual donors who helped us make this fund a reality.

We also opened a new fund to assist patients with Peyronie's disease. Whether a disease is chronic



or acute in nature, it is imperative for patients to have access to care to ensure proper disease management. Through this fund, we are now able to provide copayment assistance to Peyronie's disease patients who may not have sought medical treatment due to cost.

Finally, we made a number of enhancements to simplify our operations. We added new tools to our website, such as fund and medication listings, and we enriched our patient and provider portals with automated status and payment reminders to help patients, their advocates and providers manage their grant. Additionally, we added a limited look-back period at the front of each grant to assist with costs incurred by patients prior to applying.

Without our dedicated donors, none of this would have been possible. We are eternally grateful for the hope and healing our donors have brought to the 175,000 patients who have been touched by a HealthWell grant. Thank you for your continued generosity and for making it possible for us to impact so many lives.

I would personally like to thank my dedicated staff, our Board of Directors, and our donors for their continued trust in and support of our services. We are honored to be a recognized leader and innovator in copayment assistance and pledge to continue to operate in a manner that is deserving and worthy of that trust.

Sincerely,

A handwritten signature in black ink that reads "Krista Zodet". The signature is written in a cursive, flowing style.

Krista Zodet  
President

## Who Do We Assist?

**Age breakdown:** under 35 (6%), 35-49 (13%), 50-64 (33%), 65+ (48%)

**Marital status:** 46.1% of our patients are single and 53.9% are married

**Gender:** Female (58.7%), Male (41.3%)

**Top 10 states assisted:** Florida, Texas, California, Ohio, Pennsylvania, New York, North Carolina, Georgia, Tennessee, and Illinois

**Average household size and income:** Our patients' average income is \$28,500 (approximately 184% of the Federal Poverty Level) for a 2-person household.

**Average grant amount in 2013:** \$2,427

**Top disease areas:** Moderate to Severe Asthma (26.71%), Immunosuppressive Treatment for Solid Organ Transplant Recipients (21.94%), Autoimmune (including Ankylosing Spondylitis, Psoriatic Arthritis, Psoriasis, and Rheumatoid Arthritis) (15.74%), Secondary Hyperparathyroidism (8.10%), Cytomegalovirus Disease (5.32%)

**Referral sources:** Provider/Physician's Office (31.63%), Reimbursement Support Lines/Manufacturer (18.59%), Pharmacy (14.91%), Case Manager/Social Worker (14.26%), Another Foundation (5.54%), Private Payer/Insurer (4.21%), Website (2.40%), Public Payer/Insurer, Financial Counselor, Word of Mouth, Patient Advocacy Organization, Another HealthWell Patient, Media, or Elected Official (Less than 9%)

**Proportion of assistance requests for premium:** 4.25%

**Requests in Spanish:** 531

## Disease Areas

In 2013, we awarded more than 24,000 grants to insured individuals for assistance in meeting their out-of-pocket costs for medical treatments in the following disease areas:

Acute Porphyrias

ANCA-Associated Vasculitis,  
Wegener's and Granulomatosis with  
Polyangiitis

Moderate to Severe Asthma

Autoimmune (including Ankylosing  
Spondylitis, Psoriatic Arthritis,  
Psoriasis, Rheumatoid Arthritis)

Bone Metastases

Carcinoid Tumors and Associated  
Symptoms

Chemotherapy-induced Neutropenia

Chronic Gout

Chronic Myeloid Leukemia

Cytomegalovirus Disease

Dupuytren's Disease

Head and Neck Cancer

Immunosuppressive Treatment  
for Solid Organ Transplant Recipients

Inflammatory Bowel Disease  
(including Crohn's disease and  
ulcerative colitis)

Iron Overload as a Result of Blood  
Transfusions

Metastatic Melanoma

Pediatric Assistance

Peyronie's Disease

Post-Menopausal Osteoporosis

Secondary Hyperparathyroidism

Systemic Lupus Erythematosus

Wilms' Tumor



*"Without your generous support, I  
could not even have begun my treatment."*

—Stella

# Our Supporters and Partners

HealthWell is honored to have working relationships with hundreds of organizations and businesses to help us fulfill our mission by providing information to patients, enhancing our program services, and raising awareness about copayment assistance. We would like to recognize several organizations—some of which are also donors—for their assistance and support:

AB Data	ML Strategies LLC
Accounting Seed	Morgan Stanley
Accredo Pharmacy	MS Soft Serve
Aetna Specialty	My Crohns and Colitis Team
American Porphyria Foundation	My Health Teams
Axium Pharmacy	NeedyMeds
Bank of America	New Target
BioMedical Insights	Ober Kaler
Buzzy	Ohio State University Medical Center (Transplants)
CancerCare	Raffa & Co.
Caremark Specialty Pharmacy	Right Source Pharmacy
Covance	SalesForce
Market Access Services	South Texas Oncology
Specialty Pharmacy	Spencer Dermatology Associates
DaVita	Texas Oncology
Design Positive	THC Pharmacy of Nevada
Diplomat Pharmacy	Total Life Care Pharmacy
Document Management Solutions	UNC Hospitals
Florida Cancer Specialties	US Oncology
Fresenius	WHITECOAT Strategies
Harper Engraving	
HCMA Kidney Transplant Clinic	
inVentiv Health, Inc.	
Lupus Foundation of America	
Mintz, Levin, Cohn, Ferris, Glovsky and Popeo PC	

## Changing Lives Through Your Generous Support

HealthWell is supported by contributions from corporations and private individuals, many of whom have been touched by the work we do. The Foundation is entirely independent and is not controlled or influenced by any of its donors. The assistance that HealthWell provides to patients is based on objective criteria that the Foundation applies consistently and in accordance with applicable laws.

As a copayment assistance foundation, HealthWell operates within a complex regulatory framework. The regulations governing the health care industry, as well as a favorable Advisory Opinion that the Department of Health and Human Services Office of Inspector General (OIG) issued to HealthWell, set standards that HealthWell must meet to stay in compliance with applicable laws. According to its OIG opinion, the Foundation may not disclose the identity of its donors. This ensures that we are able to operate independently and in the best interests of our patients.

Thanks to our dedicated donors, we offer patients a chance at positive health outcomes and proper disease management—goals that we are powerless to achieve alone. Through the generosity of our donors, HealthWell has already provided financial assistance to more than 175,000 patients who, without such assistance, would likely have been unable to afford medically necessary treatments. Each year, we strive to assist as many patients as possible through the donations we receive.

## Thank You for Helping Us Help Others

We receive hundreds of calls from patients, providers, and pharmacies who pose a variety of questions to our call center representatives every day. Throughout the year, callers are asked to participate in a quick survey to let us know how we are doing and how we may be able to make their HealthWell experience even better. We would like to thank those of you who took a moment to take the survey and share some of the feedback we received from the call center representatives.

- Patients and providers continue to appreciate our user-friendly online portals to manage their grants. In 2013, we received new user registrations from more than 750 providers and more than 3,200 patients
- Patients enjoyed greater flexibility and streamlined processing through:
  - ✓ new 12-month rolling grant cycles
  - ✓ 30-day look-backs for newly approved grants
  - ✓ automatic reminders to patients to alert them of grant end dates and payment submissions through the patient and provider portals
  - ✓ enhanced portal capabilities to allow pre-approved grant recipients to view a list of documents that are still required in order to fully approve their grant.

Your feedback is very important to us and helps us make enhancements to our processes so you can spend less time worrying about your grant and spend more time focusing on getting and staying healthy.

“It was ovarian cancer spreading to the colon. Coming out of surgery, I had to learn about an ileostomy, changing the bag, food not digesting, etc. The first chemo treatment was given even before leaving the hospital. My husband called many places; no cancer society would help! One society asked what type of cancer it was, and replied: there are no funds for ovarian cancer – we cannot help. Another organization had already used their funds for the year. My oncologist’s secretary told us about the HealthWell Foundation. After talking to your group, the answer was YES, you would help. The reversal surgery was done with the ileostomy and the cancer came back. More chemo! Thank you for being there in my time of need. I can see how Our Lord works in many ways through many people.”

—Lynn

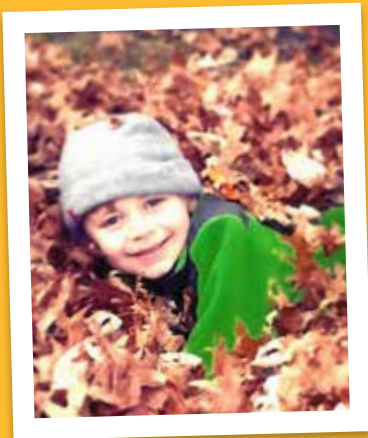


“Finn was hospitalized twice for three days, for a breathing-related illness. A pediatric pulmonary specialist determined that Finn likely had asthma, in a very severe form. Because he was so young, they could only classify it as Reactive Airway Disease, meaning that every time he had any sort of infection, his airways and lungs would react by starting to close off. I was terrified.

The doctor reassured me that it was manageable with preventive and rescue medication. I was relieved only to find out that my insurance no longer covered prescriptions until the deductible was met—in my family’s case, \$5,000. I called the manufacturer of Finn’s medication and they advised they did not have anything in place as far as coupons go, but to contact the HealthWell Foundation. I spoke with a caring representative who took time to hear our story. Then words I was praying to hear came across the line: “You are approved for a grant through the HealthWell Foundation. You will not have to worry about paying for your son’s medication for a whole year.” I was crying and could not finish the conversation, handing the phone off to my husband to work out the details.

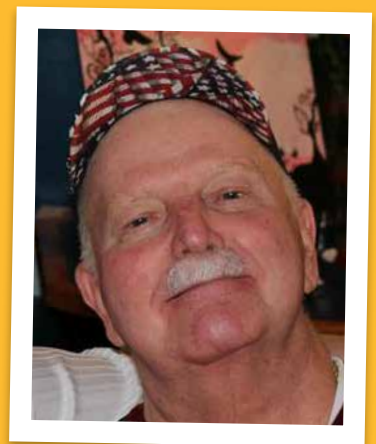
I continue to donate to HealthWell because if I can help HealthWell take away the worry from one family as they did for us, it is all worth it. Thank you HealthWell Foundation. Forever grateful!”

—Ashley (Finn’s mother)



“I was very intimidated by the cost of my medication when reviewed by my transplant team social worker. I started figuring out ways I could afford it. Then, our case worker told us we could apply for a grant from the HealthWell Foundation. I was ecstatic and very relieved when I received the grant. Not having the worry of a financial burden caused by drug costs made my rehabilitation from heart transplant surgery much easier and gave me great peace of mind. I appreciate HealthWell supporting me in my efforts to get well again. I don’t know how much money I will have left when I pass away. Hopefully that won’t happen for many years, but I have specified a percentage of my estate to be donated to the HealthWell Foundation. I thank everyone at the Foundation for all their help.”

—Ronald



# Making the Most of Your Donation

HealthWell has a proven track record of using donations effectively and efficiently. Recognized by *Forbes*, Charity Navigator and *The Chronicle of Philanthropy* as one of America's largest and most efficient charities, HealthWell ensures that your generous gift directly supports patients in need. We work in every way possible to maximize the power of each dollar donated and to serve the most patients with our donated funds. All administrative and fundraising costs are financed by HealthWell and are not taken out of any donation, which means that 100% of your donation goes directly to patient grants and services.

 Give online: [www.HealthWellFoundation.org](http://www.HealthWellFoundation.org)

 Mail your check payable to the HealthWell Foundation:

HealthWell Foundation  
9801 Washingtonian Boulevard, 9th Floor  
Gaithersburg, MD 20878

 Phone: HealthWell's Development Office  
(240) 632-5300

 Email: [Support@HealthWellFoundation.org](mailto:Support@HealthWellFoundation.org)

Our financial information can be obtained by contacting us at the above address or by visiting our website at [www.HealthWellFoundation.org](http://www.HealthWellFoundation.org).



# Make a Difference With Us

There are many ways you can help support patients in need.

## Outright Gifts

Your generous tax-deductible gift at any level will help patients pay for life-changing medical treatments they otherwise would not be able to afford. There are many ways to give:

- [Become a monthly supporter](#)
- [Make a one-time cash gift](#)
- [Give in memory of, or in honor of, someone special](#)
- [Make a charitable gift of stocks, bonds or mutual funds](#)

## Workplace and Matched Gifts

Employees can support the HealthWell Foundation by naming the Foundation as a recipient of a workplace campaign contribution. Many employers will match personal gifts made by their employees, sometimes even offering to triple an employee's personal donation. Please contact your Human Resources Department to find out if your company offers a workplace giving program or if they will match your gift to the HealthWell Foundation.

## Estate Gifts

You can make an extraordinary difference in the lives of others by making a planned gift to the HealthWell Foundation. Remembering the HealthWell Foundation in your will or trust is one of the most meaningful gifts you can offer to those who struggle with chronic illness and need the financial support for their lifesaving medications when their insurance simply isn't enough. For more information on how you can include the HealthWell Foundation in your estate plans, please contact our Development Office at (240) 632-5300 or email [support@HealthWellFoundation.org](mailto:support@HealthWellFoundation.org).

## Corporate Gifts

There are many ways for companies to become involved with the HealthWell Foundation. Opportunities are available to launch new programs and cause-marketing campaigns or to support one of our current disease funds. Your support allows us to keep funds open, create new funds for priority diseases, and meet the growing need for our services. Please contact HealthWell's Development Office at (240) 632-5300 to discuss how we can collaborate. We would be happy to work with you to design a partnership with mutual impact.

## Connect With Us—Follow and Tweet

Even if you are not in a position to make a monetary contribution to HealthWell, helping us spread the word about the important work we do can make a significant impact on the life of a patient who needs a helping hand. "Like" us on Facebook at [Facebook.com/healthwellfoundation](https://www.facebook.com/healthwellfoundation) and follow us on Twitter [@HealthWellOrg](https://twitter.com/HealthWellOrg) to help broaden our reach and increase awareness about our programs and resources. You could change someone's life with a simple post or tweet!

Please visit us online at [www.HealthWellFoundation.org](http://www.HealthWellFoundation.org) to learn more and to make a tax-deductible gift today.



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Division of Hematology/Oncology  
Massachusetts General Hospital and Harvard University

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“The HealthWell Foundation Pediatric Assistance Fund has been such a HUGE BLESSING to our family of nine. In December 2012, our family moved to a new home to start living a more “healthy” lifestyle. Within a few short months, our once healthy family developed Type 1 diabetes, asthma, chronic lung problems, chronic coughs, headaches, Bell’s Palsy and recurring pancreatitis. After investigating, we discovered that the house we had moved to had toxic mold and we found ourselves running for our lives. We were lucky enough to get out of the environment within only seven months.

Unfortunately, we have continued to suffer the devastating effects of these poisons. I agonized over how to pay to get my family the medical help that we so desperately needed. The testing we needed to check for the presence of these toxins is \$700 out-of-pocket per person, the initial visit with the environmental doctor is about \$500 per person out-of-pocket, and the monthly out-of-pocket treatment costs run between \$400 and \$700 per person for 3-12 months. The ability for our family to afford the medical help that we so desperately needed was IMPOSSIBLE, especially with my husband, our main breadwinner, off of work for more than half the year, either in the hospital or recovering from 11 pancreatic attacks.

After exploring several different avenues, I was finally referred to the HealthWell Foundation. I was elated when I received an email empathizing with our story and informing me that they were going to try to get us the help that we needed. To say I was elated and felt great hope is an understatement.

Within a few weeks, we were approved for grants for each of the children through HealthWell’s Pediatric Assistance Fund. With the help of HealthWell, we have been able to move forward in healing our family. These treatments are making a tremendous difference in the health of our family. We still have a long road ahead of us, but we feel so much hope. God bless this wonderful foundation and the donors who have made it possible for people like us to receive the help that we need!”

—Jill (mother of Pediatric Assistance Fund grant recipients)



# Revenue and Expense Summary

**HealthWell's Grant Process.** To ensure continuity of care, we award a grant to a patient for a 12-month cycle. However, not every patient uses his or her full grant. In these cases, we reallocate the unused grant to other patients in need as quickly as possible. This means we award some of our grant dollars more than once.

## 2013 REVENUE

### Expense Ratios

Patient Grants and Services	95.07%
Management	2.88%
Fundraising	0.87%
Education and Outreach	1.18%

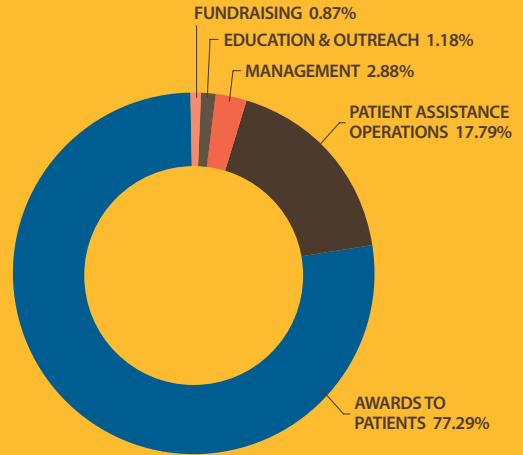
### Revenue

Donations and Other Income	\$ 18,482,644
Investment Income	\$ 2,020,853
<b>Total Revenue</b>	<b>\$ 20,503,497</b>

### Expenses

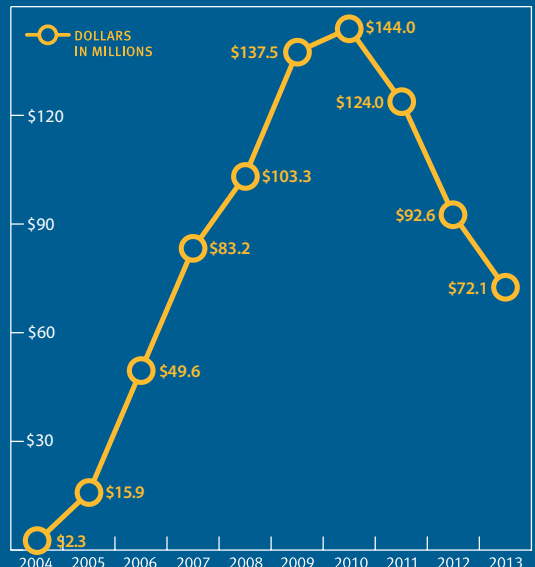
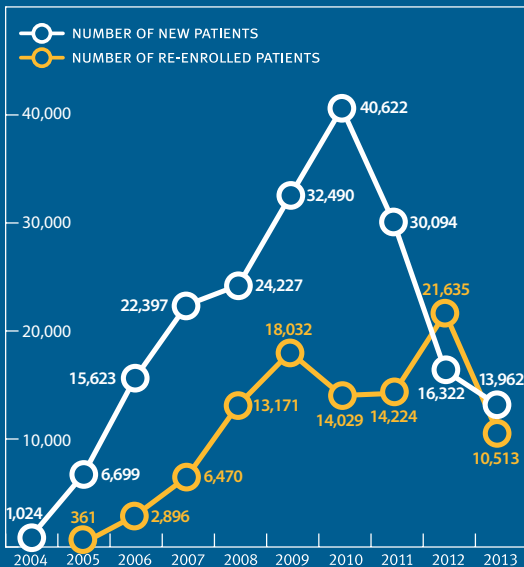
Patient Grants and Services	\$ 38,170,400
Management	\$ 1,157,319
Fundraising	\$ 347,636
Education and Outreach	\$ 472,752
<b>Total Expense</b>	<b>\$ 40,148,107</b>

## 2013 EXPENSES



## PATIENTS ASSISTED

## GRANTS AWARDED



# 2013 STATEMENT OF FINANCIAL POSITION

(AS OF DECEMBER 31, 2013)

## **Assets**

Cash and cash equivalents	\$ 2,145,663
Investments	36,833,266
Interest Receivable	10,289
Pledges Recievable	2,360,000
Prepaid Expenses	25,102
Deposit	101,883
Computer Software and Equipment, net	397,555
<b>TOTAL Assets</b>	<b>\$41,873,758</b>

## Liabilities and Net Assets

### *Liabilities*

Accounts Payable and accrued expenses	\$ 800,623
Patients' commitments payable	1,273,355
Portfolia Loan Payable	1,005,000
<b>TOTAL Liabilities</b>	<b>\$ 3,078,978</b>

### *Net Assets*

Unrestricted	\$ 4,002,497
Temporarily restricted	34,792,283
<b>TOTAL Net Assets</b>	<b>\$38,794,780</b>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b>\$41,873,758</b>



## HEALTHWELL FOUNDATION®

When health insurance is not enough.®

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