



Leveraging Support for Catholic Schools  
in the Archdiocese of Seattle

## PLANNED GIVING

Leaving a Legacy to Catholic Schools



September 2013

By now, the first bell of the school year has rung and all of the Catholic schools in our archdiocese are off to a great start! This new year brings excitement and momentum – and in many cases, transition. The Fulcrum Foundation is especially proud of the schools undergoing academic model transformations; in other words, changing the way they teach so as to be more relevant to the populations they serve, and hopefully, to open their doors to many more students. One school, as it celebrates its centennial anniversary of providing excellent holistic education, is finding cutting-edge ways to continue this tradition well into the 21<sup>st</sup> century.

In this dynamic atmosphere, a few of Western Washington's Catholic schools have been mentioned in the news over the past months. You can read more about schools in a variety of communities by clicking on links of interest below.



- Assumption Catholic School in Bellingham, WA – featured in [The Bellingham Herald](#).
- Pope John Paul II High School's founder Cecilia Brennan – Featured in the PORTLAND (The University of Portland Magazine), in an article titled, "[I Just Trusted](#)".
- Seattle Nativity School in Seattle, WA – featured on [King5 News](#).
- St. Paul Catholic School in Seattle, WA – featured in [The Seattle Times](#).
- Visitation Catholic STEM Academy in Tacoma, WA – featured in [The Tacoma News Tribune](#) as well as in [Our Sunday Visitor](#).

The Fulcrum Foundation is honored to play an important role in supporting the growth of schools and their continued ability to provide accessible and excellent Catholic education. Forthcoming is the latest in an ongoing e-news series with the goal of sharing various ways to perpetuate your support to the Fulcrum Foundation. Thank you for taking a look!



Did you know that you can reduce your taxes for 2013 by making a gift from your IRA to charity? The fiscal cliff act permits individuals who are 70½ to rollover up to \$100,000 from their IRA to charity free from federal income tax. Better yet, an IRA rollover gift qualifies for your 2013 required minimum distribution, permitting you to lower your income and taxes for this year while helping our cause. **Contact us to learn more** about how you can redirect unneeded IRA income to charity, help further Fulcrum's mission and enjoy valuable tax savings this year.



Are You Looking to Save Money this Year? Are You Planning for Your Future? **We can Help.**

There are a number of charitable plans that can help you save on taxes this year and secure your financial future. You can receive a charitable deduction by making a gift of your low performing CDs, stocks, bonds or even cash. We can also accept your appreciated assets like real estate or a business interest and help you sell these tax free. All of these gifts help you and help the Fulcrum Foundation continue our good work. Please contact us to see a personalized illustration with your tax and income benefits. To learn more about the benefits of making a planned gift, you can also visit our website or call us today.



#### PERSONAL PLANNER

### What Do You Own?

John and Helen have been thinking about updating their estate plan. They called and made an appointment with their attorney, Clara. [Read More](#)

#### SAVVY LIVING

### Health Exchange Shopping Tips for Uninsured Boomers and Early Retirees

At age 62, I will be retiring at the end of the year and plan to enroll in Obamacare until my Medicare kicks in. Can you offer me any advice on choosing a plan? [Read More](#)

#### YOUR PLAN

### Current Gifts

As is the case with many families, there are times each year when Jim and Sharon focus their attention on gift giving. [Read More](#)

#### WASHINGTON NEWS

### Affordable Care Act (ACA) Premium Tax Credits

On September 5, House Ways and Means Chairman Dave Camp (R-MI) and Education and Workforce Committee Chairman John Kline (R-MN) sent a letter to Congressional Budget Office Director Douglas Elmendorf and Joint Committee on Taxation Chief of Staff Thomas... [Read More](#)

#### FINANCES

**Stocks** - Dollar General is Worth Every Penny [Read More](#)

**Bonds** - Treasuries Rise on Weak August Jobs Data [Read More](#)

**CDs and Mortgages** - Interest Rates Tilt Back Up [Read More](#)

Once again, Thank you for your interest in supporting Catholic education. To read more about financial and gift planning with the Fulcrum Foundation, or to access more resources, please visit our [website](#).



Fulcrum Foundation, 710 Ninth Avenue, Seattle, WA 98104

[Adjust My Settings/Unsubscribe](#) From This Promotional Email | [PRIVACY POLICY](#)

© 2013 Crescendo Interactive, Inc.