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**August 9, 2010**

Dear Friends,

The Fulcrum Foundation's supporters never cease to find creative ways to maximize their ability to make an impact. This past spring, Fulcrum received an exciting and significant gift.

Capitalizing on a tax rule that allows a donor to receive an immediate tax benefit by giving their home to charity and still retain the right to live in it during one's lifetime, a donor gifted their home to the Fulcrum Foundation. The donor, who has also named the Foundation as the primary beneficiary of their entire estate, made the decision to doubly benefit the Foundation with the tax benefits received by making the gift.



"By giving my home to Fulcrum now and receiving a significant tax benefit today, I greatly increase the amount of assets that will remain to be left to the Foundation through my estate later on," said our benefactor.

The future gifts Fulcrum will receive will help make Catholic education possible for many, many children. Thank you hardly seems adequate!

## **Just For You**

What legacy will you leave? Part of your legacy may include giving. [Click here](#) to receive our brochure to learn more about creating your legacy with a bequest in your will.



## **LIVING WILLS AND ADVANCE DIRECTIVES**

As you approach end-of-life decisions, there are several steps that should be taken to make sure you have received the right type and level of care. To assist you in these decisions, most states now permit either an advance directive or a living will. [>>>read further](#)

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## **Financial Assistance for Medicare Part D Beneficiaries**

*"In one of your recent columns (What Healthcare Reform Means for Seniors) you wrote that seniors with a Medicare prescription drug plan could get a \$250 rebate check when they hit the donut hole. I've just hit it! What do I need to do to get my check and how long will I have to wait?"*

[>>>read further](#)

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## **A Bequest to Further Good Work**

Nancy and David Atkins were dedicated volunteers. Over the years, they had seen many individuals impacted by the good work of our organization. They wanted to create a legacy to provide future support to continue our mission. [>>>read further](#)

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## **September Effort to Extend Tax Cuts**

House Majority Leader Steny Hoyer (D-MD) stated on August 3<sup>rd</sup> that he hopes the House will act to extend the 2001/2003 tax cuts before adjourning on October 8, 2010. House Democrats generally agree with the White House proposal that tax cuts should be extended for individuals making less than \$200,000 (\$250,000 for married couples).

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With best regards,

*Sue Mecham*  
Development Director  
Fulcrum Foundation

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