



Hill Top Heritage Foundation Annual Report

PO Box 780 * Killdeer, ND 58640 * 701-764-5682

April 2011

Upcoming Foundation Events:

**Golf Scramble --
September 11**

**Steak Fry and Auction --
October 22**

**Tour of Homes --
December 3
(tentatively - watch for
more information)**

Limited Number of Manuscripts Left for Sale!

It Seems Like Only Yesterday is a collection of the experiences, hopes, dreams, and wisdom of a generation that experienced a life time of change. These narratives were collected over a ten-year period through a writing and memory-sharing program funded by the ND Council on the Arts and Hill Top Heritage Foundation. There is also a section in the book that includes lesson plans and hints to help you collect personal histories or for use in a group setting. It makes a great gift! The cost is \$25 with an additional \$5 to handle any shipping costs that may be incurred. Limited supply left! Act now so you don't miss out on this collector's edition! Contact Vicki Pennington in the Foundation Office to order your copy!

Foundation Explores Assisted Living Addition

Housing, or the lack of it, is certainly a topic that is getting a lot of attention these days. This is especially true if you are in an area that has been affected by the influx of workers due to the oil boom. The huge demand for workers and little to no housing for them in western North Dakota is a problem of great magnitude that has cities and towns scrambling for solutions. Expanding existing RV parks and adding new ones as well as moving in temporary housing units and "man camps" are all being tried in various capacities in attempts to house the growing population of workers and their families.

Another possibility to factor into the equation is the fact that there is a lack of housing for seniors in the area and it is thought that if adequate housing is provided



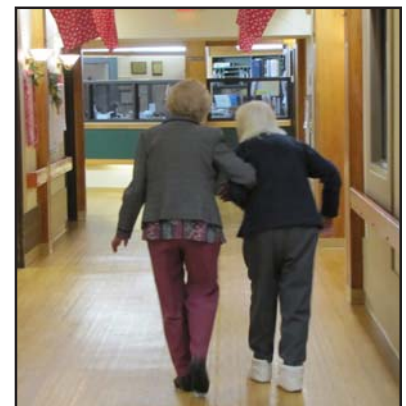
for them, it could possibly open up some opportunities for families moving into the community. North Dakota's population is aging. It is predicted that by 2020, 32.3% of the population in Dunn County will be 65 years old or older while in 2010 only 21.5% were in that age group. The problem is only going to get worse.

Several months ago, Hill Top's Board of Directors and the Foundation Board began exploring

the possibility of expanding the facility to include a few basic care beds (should they be available) as well as an assisted living addition that would be separate but connected in some way to the current building to allow for some common areas. Assisted living has many benefits but some of the obvious one include good nutrition, social contact and camaraderie, and proper medication usage while allowing the resident to remain as independent as possible.

Due to the tremendous interest that was shown, the Foundation funded a Market Analysis that was recently completed. This revealed that there was indeed a need for a facility of this nature in our area. The two boards are proceeding with caution at this point as they gather more information so that open public meetings can be held in the near future.

Hill Top Administrator Greg Armitage is excited at the possibility of the addition. "An assisted living facility would be a great addition to our existing campus as well as being an asset for our community. There seems to be a real need for housing of this type and it could be another way to keep the people who built this community here. No longer would they need to go out of the area for these types of services."



If you are interested in this topic and would like to be notified of any further developments or meetings, please contact Hill Top and ask that your name be added to the Assisted Living Information List.

**HILL TOP HERITAGE
FOUNDATION
BOARD OF DIRECTORS**

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Ed Darwin, Killdeer

Shari Barnes, Killdeer

Bob Dolezal, Killdeer

Rodney Wolf, Killdeer

Sheila Murphy, Killdeer

Kay Schmidt, Killdeer

Marion Hurinenko, Manning

Janene Knudsvig, Dunn Center

Sue Sadowsky, Killdeer

Cindy Agre, Killdeer

The Foundation Office
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PO Box 780
Killdeer, ND 58640
701-764-5682
Wednesdays,
or by appointment call:
701-764-5066 or
701-290-8184

Financial Highlights - Fiscal Year 2010

Receipts:

Memorials	\$ 3,805.00
Donations - General	2,090.00
Alwin Carus Mineral Trust	25,000.00
Alwin Carus Trust	15,000.00
Elisabeth Carus Trust	26,610.00
Cookbook Sales	20.00
"Yesterdays" Book Sales	275.00
Thrivent Gift	500.00
Interest	1,536.00
Fundraisers	35,722.00
Grant Carlson Memorial Gift (Nursing Scholarship)	5,000.00
Nursing Scholarship Memorial Gifts	75.00
Transfer from Savings	<u>20,000.00</u>

TOTAL: \$ 135,633.00

Expenses:

Equipment for HTHC	\$ 5,955.00
Salaries	36,038.00
Fundraisers	11,133.00
HTHC Employee Appreciation Gifts	1,085.00
Scholarships (Nursing & Dollars for Scholars)	500.00
Hospital Benefit	300.00
Board Meals and Gifts	293.00
Postage, Supplies, Mileage, etc.	1,642.00
Cont. Ed/Prof. Memb./Subs./Ref.	550.00
Consultant/Tax Prep./Contract	3,600.00
Printing	1,161.00
Donor Recog./PR	586.00
D&O Insurance	987.00

Normal Annual Expenses \$ 63,830.00

Bond Payment for Hill Top Home \$ 77,192.00

TOTAL EXPENSES \$ 141,022.00

Net Loss for Fiscal 2010: \$ 5,389.00

Assets:

Checking Account Balance	\$ 7,004.00
Midland Annuity	359,828.00
American Bank Center CD	106,357.00
American Bank Center CD	2,000.00
Union Bank CD	67,554.00
Union Bank CD (Anonymous Gift)	100,000.00
Passbook Savings (including interest)	62,812.00
Nursing Scholarship Savings	26,679.00

Total Assests of the Corporation: \$ 732,234.00

Liabilities:* \$ 51,610.00

*owed to Hill Top for Carus Money (Alwin Carus Mineral Trust and Libby Carus Trust). Due to accounting rule changes, Hill Top is now able to directly receive the Carus funds so those gifts need to be "paid back" to Hill Top and, were actually paid back when the October 2010 Bond Payment was made.

Hill Top Salutes The Event Sponsors For 2010 !

GOLF SCRAMBLE HOLE SPONSORS:

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S/M MURPHY FENCING
WYLIE BICE TRUCKING, LLC
TRACKER RESOURCE DEVELOPMENT

SILVER LEVEL

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XTO ENERGY

OTHER

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BRAD FONG
STEVENSON'S FUNERAL HOMES



STEAK FRY AUCTION SPONSORS:

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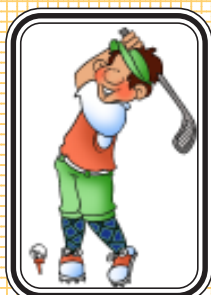
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KARA BANG - NODAK MUTUAL
AL MORRISON FAMILY
BILL TROTTER FAMILY
NEIL BOHMBACH FAMILY
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Thank you to these great sponsors and all the participants for making these, our annual signature events the best ever in 2010! We hope you will be a part of them in 2011 and help us break records again -- it is all about people helping people! We appreciate YOU!

A Message from the Foundation President...

This past year has been a busy and successful year for the Hill Top Heritage Foundation. Both boards (the Foundation and the Board of



Directors) along with many of the staff have had a busy year fundraising and working with the public on the importance of the facility in the community and its continuing need for financial support. We have had several very successful fundraisers this year with the proceeds raised going to help finance a new call light and security system which is estimated to cost in the neighborhood of \$90,000. The Foundation has also been paying the annual bond payment to take

the stress of this huge financial burden off Hill Top. This year that amount was over \$82,000. As I look back on the fundraisers, I realize the success is because of the wonderful community we are all so fortunate to live in. When I say community...my thought of community is Dunn County, all the cities in the county and the surrounding counties and cities, basically all of SW North Dakota. Vicki Pennington, our executive director has also done a great job keeping us focused and moving forward. Her time, talents and dedication to the home are also a reason our fundraisers have been so successful.

Both boards have met as a unit several times this past year and have become united in making sure Hill Top continues to grow and continues to be here for all those in need of nursing home care in our area. One of our new focuses is working toward an assisted living facility. We are in the process of conducting a formal market study to see if there is a need for one in our area.

One thing that amazes me is the dedication I see from each and every Foundation Board member to Hill Top and its residents. Several have been on the board since it began and others have been members for over 20 years. We also have several new members that are also very dedicated to the home and its residents. They all give of their time and talents as well as financially supporting the home. To me, the members of the Foundation Board are true examples of "Paying it Forward" which is one of the greatest gifts we can give to others.

We have tentatively set the Hill Top Golf Scramble for September 11, and the Steak Fry and Auction for October 22, 2011 so mark your calendars! We can work as hard as it takes to put these events on, but the real measure of success is in your hands – the public. I hope we can count on you in the future to be there for us as you have been there for us in the past!



Hill Top Wish List

* **30 Chairs with arms (aid in residents getting up and down and resident safety!)**

and 3 round tables (for dining room, activities, and fireside lounge) total for all: \$5,400.00

* **Activities Package with assorted games and supplies to enhance programing -- \$600.00**

* **2 Oxygen Concentrators total cost: \$1,153.00**

* **Teaching Manikin for Nursing -- \$1275.00**

* **Wet/Dry vacuum with attachments for House-keeping -- \$700.00**

* **New Burnisher for Housekeeping -- \$850.00**

* **Flooring for the Laundry Room and Supply Room (check with us)**

* **7-9 Passenger Van \$40,000.00 (trade in big white van)**

* **Manikins for CPR training -- (\$1,250) for all staff**

* **Equipment for Hill Top Home Health -- Otoscope, IV Pump, Vitals Machine -- \$4,000.00**

* **TV and DVD Player for the Family Room -- \$650.00**

* **Internet access on-the-go and 3 portable printers - Hill Top Home Health - \$3,600.00**

Dear Friends,

I found a rainbow in this town. That line probably has little meaning to you, but to me it is special and a saying that I will never forget. It's a line from my father's retirement speech and the story that goes with it dates back to my childhood. Those were the days when the Bismarck/Mandan area was plagued with annual flooding. As children growing up there, my brothers and I were sometimes a little uneasy that our house might be washed away next. Our parents needed to reassure us from time to time that since we lived on higher ground we would always be safe. Once, as my father was explaining this, my brother Dean, then about six years old, looked up at my Dad and matter of factly stated, "There will never be a flood here, because I saw a rainbow in this town."

In my father's speech, he talked of all the good he had found in Bismarck — the people, the community, the school system - a place he was happy to put down his roots and devote his life trying to make better. A place he was proud to call home, raise his family, retire and grow old. I was newly married

at that time and as I listened to his speech, I wondered if I would ever find a town that would be MY rainbow, where I would want to put down my roots.....

Now, many years later as I listen to the stories told to me by those who have invested in Hill Top — our donors and loyal board members — the words of my father's speech ring true to me again. It is clear to me that these dedicated, caring, hard working individuals have truly found their rainbow in Killdeer. Many have dedicated their lives to making this town and community a better place. Hill Top is only here because a community took notice of a need and did not give up until that need was met and Hill Top's doors were opened.

A number of individuals have been honored for providing dedicated service and dollars to Hill Top since it was merely a dream and continue to work on its projects today. There are many more that are deserving of honor and they, too, will have their day in the limelight. There are still others who prefer their contributions will never be

publically acknowledged but have made a huge difference in many lives. The work goes on...

Now, the time has come for all of us to step up to the challenge. We must learn the winning ways of those who came before us and continue the actions of building communities and keeping them strong for future generations. There are families returning to the area because Killdeer has much to offer them, but they must also find their rainbow and not just reap what has been sown. Some are rising to the challenge of leadership in working on the West Plains Cultural Center and serving on various boards and committees and other much needed projects, but we also need their enthusiasm and passion at Hill Top. For Hill Top Home of Comfort is not here just to care for those in need of long term care services.

We must not forget that Hill Top provides over a hundred jobs for people in the community. These jobs vary from afterschool and summertime positions to career opportunities. There is also Hill Top Home Health that
(cont. on page 6)

Hill Top Heritage Foundation Spring Appeal 2011

"I Found a Rainbow"

Please complete this coupon and return with your gift in the enclosed envelope.



Yes! I can help! I want to make a difference in the lives of the residents!

Enclosed is my donation of \$25 \$50 \$75 \$100 or \$

Name: _____

Address: _____

Phone: _____ Email: _____

My gift is given in honor of _____

or in memory of _____

Please send acknowledgment to:

(include complete mailing address)

Please add me to your mailing list!



I would like to designate my gift to a special project:

*Nursing Scholarship

*Call Light/Security System

* _____

(other, please name)

Thank you so much for your support of Hill Top Heritage Foundation. You are making a positive difference in the lives of the residents and your community. We appreciate your commitment and continued support!

(Friends, cont. from page 5)

provides in-home nursing services to clients of all ages. In addition, Hill Top contracts with Applied Medical to make outpatient therapy services available in Killdeer. These are all benefits we cannot afford to lose. It takes commitment and hard work as well as financial resources but just as those who laid the ground work over twenty years ago, we must continue to commit to excellence and make sure Hill Top Home lives up to its reputation as "The Home with Heart." It is a special place that impacts this rural community and the surrounding area.

I recently read an excellent interview of Patrick Atkinson, the CEO and Founder of The God's Child Project, which began in Bismarck over 20 years ago and now serves Guatemala, El Salvador, India, Africa and the United States. He has expanded his mission into preventing human trafficking and exploitation as well as education and healthcare. His advice for young people looking for a career was interesting. "Do whatever it takes to get your college degree, then go outside your comfort zone. Live life, but don't live it for yourself - live to be present to others. In the process of doing this you will discover who you are." Atkinson speaks about being born in Bismarck but growing up in Central America. He has enriched the lives of thousands of impoverished and abused children and mothers. He's been shot at, burned, and knifed but he has never wavered from his mission to make a difference. I think he found his rainbow.

Life is all about finding your passion - your rainbow— and making a difference. It is evident that many have found their rainbow here. Hill Top Home of Comfort is a prime example of the good that can happen when people step out of their comfort zone to make a difference in the lives of others. Let's keep that rainbow arching over this wonderful community of Killdeer. Please use the coupon and envelope provided and make a donation that will truly make a difference in the lives of others. I know I found a rainbow in this town. Did you?

Happy Spring!

Vicki Pennington

Vicki Pennington, Foundation Director
Hill Top Heritage Foundation



2010 Projects for Hill Top Home Funded by the Foundation

Round Table for Staff Lounge (Memorial Gifts)	\$ 290.00
Handicap Accessable Picnic Tables for Residents (Memorial Gift plus Donation)	\$ 1,500.00
Outdoor planters	\$ 175.00
New Hair Dryer for resident use (Memorial Request)	\$ 274.00
Employee Appreciation Gifts (duffle bags)	\$ 887.00
Market Analysis Study for Assisted Living	\$1,200.00
Bond Payment	\$ <u>82,200.00</u>
Total	\$ 86,526.00

Your memorials, gifts and donations at work! Thank you for your generosity!



Hill Top Peer Committee President Elaine Andersen is shown presenting a Hill Top "Home with Heart" sweatshirt to CNA Cori Dressler. Dressler won the sweatshirt in the Paid Time Off Raffle hosted each winter by the Heritage Foundation. Suzi Schwartzenberger was the grand prize winner of a paid day off. The second prize, a Hill Top Home sweatshirt of choice donated by Jen Brew of Embroidery Arts, was nearly as popular as first prize! The annual raffle is a fundraiser for the Hill Top employees. In the past they have purchased a candy machine, but have not yet decided on their next purchase. The PTO Raffle is also a morale booster since it is held following the holidays and in the midst of the long winter.

~ Foundation Salutes Long Time Supporters ~

Sydney Larsen Supports the Nursing Scholarship Fund



Sydney is (shown with granddaughter Sarah Wallace) dressed and ready for a UND hockey game! (Courtesy Photo)



Sydney was an active member of the Heritage Foundation Board for many years as well as supporting Hill Top financially from the beginning. "It has been something I have always believed in," she stated. "In fact, I have been a resident there a couple different times! The care there was just great!"

Sydney is well known in the area for her love of life, great sense of humor, and giving nature. You couldn't find a better friend or neighbor. She enjoyed a ride in a convertible on her 90th birthday and still remains an avid Sioux hockey fan and continues to attend their games with her family.

Sydney's most generous gift will go a long way towards helping many individuals follow their dreams of a career in nursing! If you would like information on Hill Top Heritage Foundation's Nursing Scholarship Program, please contact Vicki Pennington in the Foundation Office or Carmen Lawson, Director of Nursing.

A gift to the Nursing Scholarship Fund appealed to Sydney for many reasons – one being that she had always wanted to be a nurse herself, but had never had the opportunity to do so. Her daughter, Linda Wallace was fortunate to be able to live her mother's dream and, in fact, was Hill Top's first Director of Nursing. Linda was instrumental in getting the Nursing Scholarship Fund established. It is hoped that it will help to combat the nursing shortage.

"The thought of helping someone to obtain their dream really appealed to me," Sydney explained. "That would very be rewarding to know I made a difference in a young person's life!"

Combs Honored for Years of Dedicated Service

John and Ferne Combs have spent a lifetime improving the image and town of Killdeer. No matter what committee or board John served on, he made it a point to make a positive difference in this community. That is especially true of his service to Hill Top and Ferne has been working hand in hand with him the entire time. His specialty is building and grounds and he has served on that committee the entire 23 years he has been on the Hill Top Home of Comfort Board of Directors. As a charter member of that board, he is a great reference for the history of Hill Top. He was involved in many of the adventures that eventually led to the construction itself. A favorite story of many that illustrates the dedication of the Combs' is the care they gave the tree rows over the years. They did everything from pulling weeds by hand to carrying water to them to make sure they would survive.

John and Ferne are currently residing at Hill Top and they have a whole new appreciation for the nickname "the home with heart." Both praise the staff for the wonderful care they have been given and are very impressed with the homey atmosphere that they are enjoying.

The Heritage Foundation has begun recognizing and honoring a few of these dedicated individuals each year so that the important roles they have played in Hill Top's history are not forgotten. Thank you John and Ferne. We appreciate your hard work and dedication!

John Combs was presented with a beautiful clock as a token of appreciation for his many years of service to Hill Top Home of Comfort. He is shown with his wife Fern and Foundation President Jodi Carlson at the Hill Top Christmas party in December where he was honored. (Herald courtesy photo)

Carlson's Make Annual Contributions

Kent and Jodi Carlson made a significant pledge for annual gifts to the Hill Top Heritage Foundation Nursing Scholarship Fund when the fund was begun three years ago and these annual gifts have helped greatly towards stabilizing the fund and guaranteeing there will be money for the future. The gift was given in memory of Kent's father Grant Carlson.

"Grant was a firm believer in education," Jodi explained. "This fund is so important because it could open the door for someone who would never have an opportunity to attend college without it."

Jodi has also been an active member of the Foundation Board for nearly twenty years and knows the importance of consistent giving. "Hill Top has many needs and it is important that we are able to keep it to the standards it is known for. That is impossible if we depend on fundraising alone."

Keeping people in their home communities was a very important consideration when the building of Hill Top was in the planning stages. Grant Carlson was one of the individuals that was able to take advantage of Hill Top being here for him and felt very fortunate about that fact. It was so important to him to be able to stay in the community where he spent his entire life - among family, friends, and familiar faces.

The Foundation greatly appreciates the generosity of the Carlson family – both their financial gifts and their gifts of time and talents. All are very precious and Kent and Jodi have given very freely and consistently to Hill Top.



Foundation Fundraising Highlights of 2010

Spring Fling - Mexican Style!

The Spring Fling was again based on the Cinco de Mayo celebration that is celebrated annually in early May. The popularity of the Mexican theme has been evident by the success of the event since the theme was adopted several years ago. It was a fun filled evening whose proceeds had been earmarked to support the Foundation's Nursing Scholarship Fund. The American Legion and the Auxiliary have been wonderful to



open their doors to the Foundation with the Auxiliary providing a great Mexican meal and the Legion men manning the bar and providing the trademark margaritas. Homemade salsa with chips and delicious desserts topped off the menu and no one went away hungry! Bingo for cash was played during the evening as well as a silent auction to help boost the proceeds for the scholarship fund.



Unfortunately, the Foundation was unable to undertake this event this year due to scheduling conflicts but look for it to be back again next year!

Golf Scramble



It's been eight years now and fortunately, the annual Golf Scramble just seems to be getting better and better – at least that is the message that is being sent by the continuing increase in participation both by golfers and sponsors and in terms of dollars raised. This year an all time high of over \$9,000 was raised! The Medicine Hole Golf Course set on the edge of the beautiful Killdeer Mountains paired with an early fall day before the busy school activities start make for a winning combination for everyone involved.



Following the eighteen holes of golf, golfers enjoy steak hot off the grill complete with all the trimmings and some great fellowship. Why not plan to join us this year? Mark September 11 on your calendar, grab some friends, and “*Golf the Legend*” for a great cause – Hill Top Home of Comfort!

Hill Top Football Fever



Now there are two different football pools to enjoy that help Hill Top at the same time! Due to the great response to the Foundation's Monday Night Football Pool, the group added a Super Bowl Pool to its football fundraisers. The format is basically the same, with both pools giving you several chances to win with an investment of \$25. The Super Bowl Pool pays out \$100 for each of the first three quarters and then a grand prize of \$250 for the final score; while the Monday Night Pool pays \$25 at half time and \$50 for the final score match for each of 17 games. (Barring no additional games by the NFL!) There is no limit as to how many times you can win throughout the season – it is just the luck of how the numbers randomly fall on the cards. The Monday Night Pool books sell out very fast and only 100 are available, so if you would like to get in on the fun, contact a Foundation Board member or the Foundation Office in late August and one will be reserved for you. Neither are huge money makers, but do add to the coffers with only a small amount of labor and have been well received by the community..... Fundraisers that really do keep the “fun” in the term! Word is that the pools have even added some excitement to television football for some otherwise less than enthusiastic fans!



Shop Til You Drop!

The Heritage Foundation feels fortunate to continue to be included in the Dickinson Herberger's Community Days which is held in November and February. Prior to the actual shopping days, the Foundation has the opportunity to sell as many coupon books as possible keeping the entire \$5 for its organization. There are numerous other nonprofits in the area that are offered this opportunity. Herbergers also encourages each group to choose a time prior to the designated shopping day to sell the books in their store, again keeping all the proceeds from the sales for the individual charity. The receipts that are sold at the store are later divided among the participating charities. It has been a great opportunity for the Heritage Foundation to make some pretty good money with no expenses – especially if there are some avid shoppers because the coupon books are filled with great bargains. Keep the Heritage Foundation in mind when you see Community Days advertised....Who knew you could help Hill Top just by going shopping?



Steak Fry and Auction

“Yahoo! We’re Twenty Two and Still Need YOU!”, was the theme for the twenty second annual Hill Top Heritage Foundation Steak Fry and Auction. The Foundation has been sponsoring this community event for twenty two years now, but the only way it continues to be a success is through the wonderful support that YOU, the people of the area have shown. To make that point perfectly clear, YOU were included in this year’s theme!



On Saturday evening, October 16, the Foundation, with help from the Board of Directors, the Department Heads and other staff members, hosted a great evening of family fun. Eric Kehr generously donated the use of the Buckskin Dance Hall again this year which provides a wonderful place for the steak supper as well as games and the auction. Everyone works hard not only to make the fundraiser a success financially, but also to continue the tradition of community spirit and fun. Feature auction items included the one-of-a-kind furniture pieces that are created or painted by area artists and craftsmen. Many of the artists have been contributing for several years now and the Foundation is extremely grateful for their willingness to continue to stay involved. It was decided that the proceeds from the Steak Fry and Auction would go towards the purchase of new security and call light systems since the safety and care of Hill Top’s residents is always top priority. It turned out to be one of the most successful events ever with profits going over the \$15,000 mark. Next year’s date is set for October 22 – plan now to attend! Watch for more details coming soon!



Light Up a Light



The holidays are many things to many people, but very few can think of the holidays without memories of family traditions becoming a part of those thoughts.

Hill Top Heritage Foundation’s *Light Up a Light* program gives you a wonderful opportunity to honor the people who have created the holiday memories and traditions in your life, or those who have simply touched your life in a special way somewhere along life’s highway. This is the tenth year for the program that not only lights up a beautiful pine tree outside of Hill Top Home for many to enjoy but also the faces of those you honor and remember. An added bonus is that the money raised from this program helps to support the many projects of Hill Top Heritage Foundation. For each \$5 donation, a light will be lit and dedicated to a special person. They may be dedicated in honor of or in memory of people special to you. A list of all the donors and the honorees will be printed in the Dunn County Herald as well as being on display at Hill Top.

Thank you for your wonderful support of our fundraisers ---
it is only because of YOU that they have been so successful!

Save on Taxes -- Invest in Your Community

Great Tax Credits Available Through Donations to Nonprofits

With tax season fresh in our minds, it might be a good time to take a look at how charitable contributions can affect your total tax liability at both the federal and state level and take a look at a specific strategy which might apply for some of us.

Charitable contributions can provide a dollar for dollar reduction in your adjusted gross income up to 50% of your total income. For example, if your gross annual income is \$100,000 you can deduct up to \$50,000 in charitable donations for that tax year. In addition, there is a state tax credit available for 40% of a charitable donation to a qualified endowment fund in the state of North Dakota. The Hill Top Heritage Foundation has established such an endowment and has all the legal paperwork in place to assure your tax credit will be properly documented. The benefit of a tax credit is that it is deducted directly from your tax liability and can be carried forward for up to three years if you do not need the entire amount the first year. For example a \$5,000 donation to an endowment fund can result in a \$2,000 tax credit against

ND state taxes. Often times, donors will find that well over 50% of their gifts end up being "subsidized" through State and Federal tax incentives! It is interesting to note that only North Dakota and Montana have such generous tax credit laws available at this time.

A specific giving strategy which may be useful for some people who see a spike in their income in a given year is a Charitable Lead Trust (CLT). In a CLT an asset is put into a trust for a specific period of time. The income from the asset in the trust over that period of time goes to a named charity. After the specific period of time the asset comes back to the donor to do what they want with it.

An interesting feature of a CLT is that the amount of interest income generated and paid to the charity annually for the life of the trust can all be deducted from your adjusted gross income in the first year of the trust. For example, if \$100,000 was placed in a CLT for 5 years and yielded 5% or \$5,000 annually for the length of the trust, the entire \$25,000 of income the CLT would

generate for the charity over the 5 year period could be deducted in the first year of the trust. If in the first year you set up the trust your income had spiked to the 35% bracket for tax purposes the \$25,000 deduction could save you \$8,750 in federal income tax liability. In addition you would have a \$2,000 annual tax credit against ND state income taxes. The savings in federal and state tax liability would be \$18,750 over the life of the trust.


Don't find yourself paying more income tax than you would like again next year – think of Hill Top (or another favorite charity that could benefit from your generosity) and all the good you could do! If you would like more information about tax savings from charitable giving please contact the Foundation office at Hill Top Home of Comfort at 764-5682, extension 257 or email vpennington@hthc.org. Of course, it is always best to get tax advice from a professional tax advisor so they may address your individual needs and circumstances.



Don't forget! **Golf Scramble --- September 11, 2011**
Steak Fry and Auction ---- October 22, 2011 **See you There!**

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Hill Top Home of
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Hill Top Heritage Foundation, Inc., was established to receive and administer gifts for Hill Top Home of Comfort. Gifts to Hill Top Heritage Foundation, a 501(c)(3) organization, are tax deductible. A variety of giving opportunities are available. Your generosity and foresight in planned giving are much appreciated and could truly make a difference in the lives of many, as well as leaving your legacy for the future.