



SUPPORTING TODAY SECURING TOMORROW

The Rotary Foundation

Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves.



TRF
Support The Causes You Care About

OUR FUNDS



PolioPlus Fund
End Polio Now



Annual Fund
For Support Today



Endowment Fund
To Secure Tomorrow

CREATE YOUR LEGACY

Your gift to the Endowment ensures a steady stream of support so we can continue to change the world well into the future



ENDOWMENT FUND

**SHARE
WORLD FUND
ROTARY PEACE CENTERS
EDUCATION
AREAS OF FOCUS**



- Gifts are not spent, but rather invested
- When you give to the Endowment, your gift will affect lives for generations
- The earnings provide ongoing support to Foundation grants and programs
- A Personal LEGACY



WHY SUPPORT ROTARY'S ENDOWMENT

NAMING OPTIONS

GLOBAL GRANTS & ROTARY PEACE CENTERS

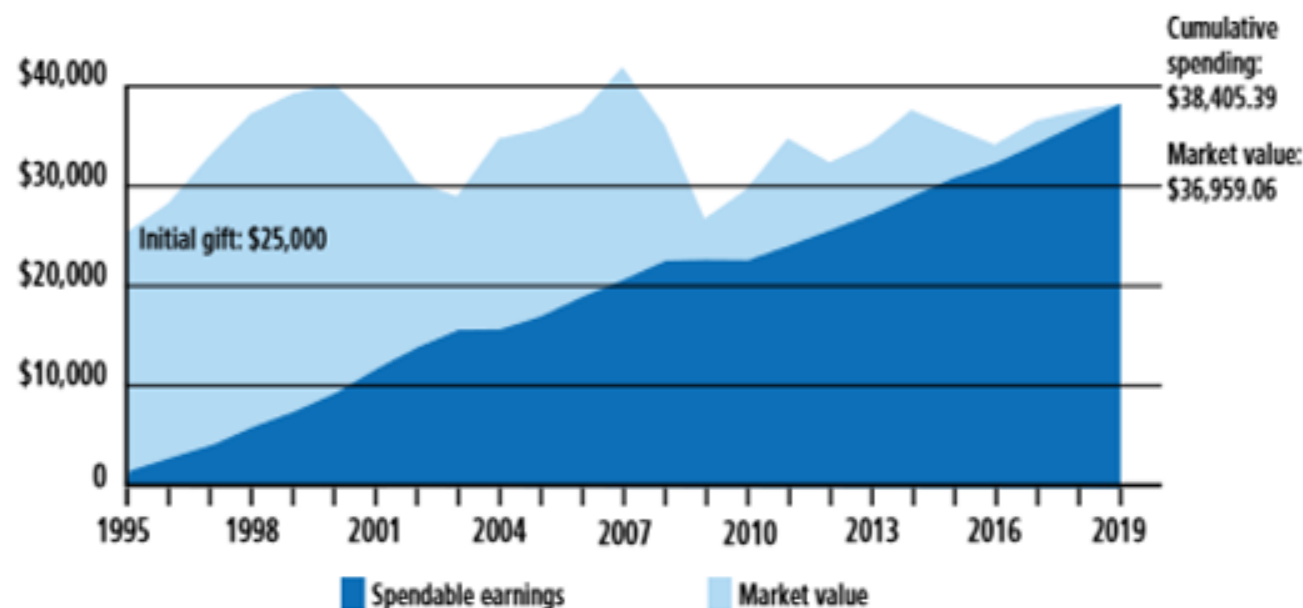
- Named Endowed Funds



PERSONALIZE YOUR ROTARY LEGACY

ENDOWMENT OPPORTUNITY

A **Named Endowed Fund** of \$25,000 established in 1994 has provided spendable earning since then of over \$38,000, which is more than the original gift amount. Additionally, the fair market value has grown to over \$36,000. The graph below demonstrates how an Endowment Fund contribution continues to give and grow over time.



The illustration depicts past performance and cannot be relied upon as an indicator of future performance.

A group of men are standing in a rural setting, possibly a construction site. In the foreground, two men are smiling and looking at each other. The man on the left is wearing a blue t-shirt with the Rotary logo. The man on the right is wearing a green t-shirt with the USAID logo and a graphic of a person climbing a ladder. They are both holding a large, shallow, light-colored bowl filled with a grey, powdery substance, likely cement or soil. In the background, several other men are standing, some wearing similar t-shirts. There are large banana leaves and a thatched roof visible in the background.

WAYS TO GIVE

SIMPLE TO COMPLEX VEHICLES

- Cash or pledge (Monthly CC)
- Appreciated Stock
- Bequest in Will
- IRA Beneficiary
- Life Insurance
- IRA Charitable Donation (Age 72)
- Retirement Plan Assets
- Donor Advised Fund
- Life Income Agreements
- Real Estate

Consult your tax and legal advisors before making any charitable gift

OUTRIGHT GIFTS

Simple and most common vehicles

Giving options:

- Currency, check, credit card, Rotary Direct
- Appreciated stock gifts can bypass capital gains
- Qualified Charitable Distributions from IRA for donors can reduce taxable income (age 72 up to 100k/year)
- All of the above can be used to fulfill pledges that spread payments over a 3-year period. (Ex. $\$25,000/3 = \$8,333$)

DEFERRED GIFTS

Planned commitments to be paid later

Giving options:

- Naming The Rotary Foundation in a will or living trust
- Retirement plan beneficiary designation
- Life insurance beneficiary designation

BEQUESTS

How to include Rotary in Your Estate Plan

- Minimum gift: \$1,000
- A percentage, a specific dollar amount or residual
- Qualifying Age: any age
- Endowment Fund supporting the Rotary program of your choice
- Recognition: Benefactor, Bequest Society, or Legacy Society
- Source of Gift: Will, a trust, 401K, IRA, life insurance policy, bank account
- Create a Named Endowed Fund with a bequest of \$25,000 minimum

STRUCTURED GIFTS

Gifts that may earn income or reduce tax

Assets may provide creative options for:

- Charitable Gift Annuities
- Charitable Remainder Trusts
- Real Estate Donations
- Gifts of Tangible Personal Property

CUMULATIVE GIFTS TO DATE OR STRUCTURED GIFTS AND PLEDGES

Major Donor

\$10,000+

Arch Klumph Society

\$250,000+

DOCUMENTED PROMISE OF A FUTURE GIFT

Bequest Society

\$10,000+

Legacy Society

\$1,000,000+



Yes, I/we have made a commitment to The Rotary Foundation Endowment.

Name(s) to appear on recognition materials and/or for future publication: _____

Address: _____

City, state or province, country, and postal code: _____

Email: _____

Optional:

Rotary ID #: _____ Rotary club name: _____

Rotary district: _____

Date(s) of birth: _____

Home, business, and/or mobile phone: _____

The spending portion of the gift shall be:

Unrestricted (World Fund)

Directed to:

☐ SHARE (World Fund and District Designated Fund)

Rotary Peace Centers

One or more areas of focus:

☐ Peace and conflict prevention/resolution

☐ Disease prevention and treatment

☐ Water and sanitation

☐ Maternal and child health

☐ Basic education and literacy

☐ Economic and community development

Contact me at the phone number above to gift designation preferences.

Signature: _____ Date: _____

Signature: _____ Date: _____

Please return this form and any supporting documents you wish to share that name Rotary as beneficiary. Contact information for your nearest Rotary office is featured on the back cover.

The bequest will be funded by (some gift options are not available in all regions):

☐ Will or living trust

☐ Retirement plan beneficiary designation

☐ Life insurance beneficiary designation

☐ Donor advised fund

☐ Charitable remainder trust

☐ Other (please describe) _____

The gift to The Rotary Foundation is expected to be:

US\$ _____

(The dollar amount is used for recognition purposes; if no amount is selected we will default to Level One.)

Recognition options:

For those who commit \$10,000 or more, an engraved recognition crystal and one recognition pin per person will be automatically shipped to a home address.

My/our recognition preferences are noted below:

☐ I/we do not wish to receive an engraved crystal.

☐ I/we would like a pendant with the pin(s).

☐ Tell me more about special naming opportunities.

☐ Send all recognition materials to this address instead: _____

☐ I/we have another request. (Please describe) _____

INCREMENTAL PARTICIPATION

- EREY (\$8.34/month or \$100 per year)
- Paul Harris Fellowship (accumulated donations of \$1,000*)
- PHF + 1-8 (Additional 1K per level)
- PH Society (PHS) (Commitment to give \$1,000 per year)
- Major Donor (accumulated donations of \$10,000)
- MD Level 2, 3, 4 (\$25,000; \$50,000; \$100,000)
- Arch Klumpf Society (accumulated donations of \$250,000)



**Thank
You!**

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