

Canada	Great Britain and Ireland	South Pacific/Philippines	United States
The Rotary Foundation (Canada)	Rotary International	Rotary International	The Rotary Foundation
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		Australia 2150	
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Rotary International	Rotary International		
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CH-8032 Zurich	124 Janpath		
Switzerland	2nd Floor, Central Wing		
	New Delhi 110 001		
	India		

A Benefactor of The Rotary Foundation is anyone who informs the Foundation in writing that he or she has made provision in his or her will, or other estate plan, naming the Foundation's Permanent Fund as a beneficiary, or anyone who makes an outright gift of US\$1,000 or more to The Rotary Foundation's Permanent Fund.

The Rotary Foundation appreciates information about commitments from which it will benefit in the future. We recognize the highly personal nature of these commitments. Unless we receive other directions from you, Benefactor Recognition will be sent to your club president. The Trustees are grateful for your gift and for your permission to publish your name as a Benefactor so that your example may inspire others.

Designating the use of your gift

Unless you specifically direct otherwise, your bequest will be placed in the Permanent Fund. However, you have options as to the purpose for which the annual spending portion of your bequest will be used. You can direct that the annual spending portion be placed in the World Fund, where it will generate support for an array of Foundation programs. Or, if the spending portion is directed through *SHARE*, your Rotary district may help direct the spending from your bequest to programs it selects.

Bequests which are undesignated or which give discretion to The Rotary Foundation Trustees will be placed in the Permanent Fund, and the annual spending portion will be directed to the World Fund for use where the need is greatest.

Let us help — and thank you!

Whichever of these forms and purposes you chose for your bequest, The Rotary Foundation is able and eager to assist you. At your request, a representative of the Foundation will be happy to meet with you and, if you wish, with your legal and financial advisers, to discuss your goals and refine the wording of your bequest or trust.

When you have completed or amended your will or trust, we hope you will let us know so we can express appreciation for your generosity. You may use the card attached for this purpose. With your permission, we will list your name among the growing number of committed Rotarians who have provided for future gifts to the Foundation with the hopes of encouraging others to take this important step.

If you would like to know more about ways to give, please contact your district Foundation chair or the Foundation's Fund Development office.

With your help, we can make the vision of a better world, a reality.

“No one can tell us what Rotary will be tomorrow, but one thing is inevitable: what Rotary will be tomorrow depends upon what we Rotarians do today.”

Arch C. Klumph
1917, Sixth President
Rotary International

*...tomorrow depends
...tomorrow depends upon what we do today.
upon what we do today.*



Planned Giving Officer
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www.rotary.org

Securing the Future



*Your Bequest to
The Rotary Foundation*



The Rotary Foundation

I expect my gift will amount to US\$ _____.*

*Bequest commitments of US\$10,000 or more qualify you for membership in the Bequest Society. Additional information on the Bequest Society can be obtained at www.rotary.org.

My Benefactor commitment to The Rotary Foundation's Permanent Fund will be in the form of:

☐ Will/Bequest ☐ Ournight gift ☐ Other (please specify) _____

I designate that the spending portion of my gift will be applied*:

☐ at the Trustees' discretion (World Fund) ☐ through SHARE (District Designated Fund and World Fund)

*Should no designation be specified, the Trustees will use it for programs supported by the World Fund.

Name _____ District _____ Rotary Club _____

Address _____ Date _____

Telephone _____ E-mail _____ Date of Birth ____/____/____

Please return this portion of the card to the appropriate address listed on the reverse side.

A contingent bequest takes effect only under certain conditions: "In the event my spouse does not survive me, I give to The Rotary Foundation of Rotary International, the sum of . . ."

Living trusts

Perhaps you have already created a living trust and transferred many of your assets to it, which have become the trust assets. Trust assets will not be subject to probate.

A trust agreement of this type acts like a will, in that it specifies the individuals and organizations to receive the trust assets. The Rotary Foundation may be included in a living trust agreement, just as in a will.

Personalizing your legacy

If your bequest totals US\$25,000 or more, you may establish an endowed fund within the Permanent Fund. The fund could bear your name and that of your spouse, or the name of another family member, friend, or colleague. Though commingled with other funds for investment purposes, your fund will be separately identified in the Foundation's records. You can also designate someone to receive stewardship reports on your gift, so that others will know the good that your gift is accomplishing.

Here is an example of language creating a named fund: "I give to The Rotary Foundation of Rotary International, an Illinois not-for-profit corporation, [indicate the amount or property to be given] to establish the John and Helen Smith Endowed Fund within the Permanent Fund."

Please consult with independent tax and/or legal counsel in reference to all gifts.

Advancing your legacy

By making a gift in your will to The Rotary Foundation's endowment — the Permanent Fund — you can promote a better world beyond your own lifetime. Such a gift contributes to a solid funding base that will benefit the Foundation's programs in perpetuity.

A will provides for family and loved ones and is also a means to continue your vision for The Rotary Foundation's future. A will ensures that you:

- ↪ Use your accumulated assets as you see fit
- ↪ Ease the transition of your passing for those who survive you
- ↪ Record your wishes now but retain the power to change them as your circumstances change
- ↪ Honor someone with a named gift
- ↪ Support charitable institutions by transferring assets at a time when you will no longer need them

If you presently have a will, you can easily add an amendment (or "codicil") to provide a bequest.

Sample language to add to or include in your will or trust document:

A general bequest is for a certain percentage or portion of the estate: "I give to The Rotary Foundation of Rotary International one-fourth of my property."

A specific bequest directs that the Foundation is to receive a specific piece of property: "I give . . . 500 shares of XYZ stock to The Rotary Foundation of Rotary International."

A residual bequest designates all or a portion of whatever remains after all debt, taxes, expenses, and other bequests have been paid: "I give . . . 50 percent of the rest, residue, and remainder of my estate to The Rotary Foundation of Rotary International."

The original vision
of Rotary was to
create a better world.

Today The Rotary Foundation of Rotary International honors that vision by doing its utmost to alleviate the ravages of illness, poverty, and illiteracy. The Foundation's programs address the international community's need for peace, education and training, and adequate food and water through an array of humanitarian, educational, and cultural programs. Contributions from generous Rotarians and their families go directly to the Foundation's educational and humanitarian programs.

Join with the founding members of Rotary International and envision:

- ↪ A world without hunger
- ↪ A world with new ideas
- ↪ A world where disease is defeated
- ↪ A world that respects all faiths, races, and cultures
- ↪ A world where peace flourishes

"...WHAT ROTARY WILL BE
tomorrow
DEPENDS UPON WHAT WE
Rotarians
DO TODAY."