

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:
 - _____ Peacebuilding and conflict prevention
 - _____ Disease prevention and treatment
 - _____ Water, sanitation, and hygiene
 - _____ Maternal and child health
 - _____ Basic education and literacy
 - _____ Community economic development
 - _____ Environment

- ☐ Please contact me at the phone number above to discuss gift designation preferences.

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, 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 (for commitments of \$25,000 or more).
- ☐ 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) _____

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.

rotary.org/legacy

World Headquarters

Rotary International
One Rotary Center
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Evanston, IL 60201-3698 USA
Tel. +1-847-866-3100
Email: legacy@rotary.org

Brazil Office

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Condomínio Comercial Casa das Caldeiras
Av. Francisco Matarazzo, 1752, conj. 1421
Água Branca
São Paulo, SP
05001-200 Brazil
Tel. +55-11-3217-2630
Email: fr.brasil@rotary.org

Europe/Africa Office

Rotary International
Witikonstrasse 15
CH-8032 Zurich, Switzerland
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Email: eao@rotary.org

Japan Office

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Mita 1 Chome 4-28
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Japan
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Korea Office

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Email: rikorea@rotary.org

South Asia Office

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Email: risao@rotary.org

South Pacific and Philippines Office

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Email: risppo@rotary.org

Great Britain and Ireland Office

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Warwickshire B49 6PB
England
Tel. +01789 765411
Email: rfuk@rotarygbi.org



The Rotary Foundation

Your Rotary Legacy

Doing Good in the World beyond your lifetime

Rotary's tomorrow depends on what we do today.

You can be an important part of the Foundation's next century of serving humanity by including a gift to Rotary's Endowment in your estate plan.

Your gift will be carefully stewarded to provide funding for the programs you know and love, year after year. The principal is never spent and available earnings are used to make a lasting difference in people's lives. A gift from your estate to the Endowment will provide ongoing financial support, just as your annual contributions do today.

Join the many Rotarians and friends who have made commitments to improving and enriching lives around the globe by creating your personal legacy with The Rotary Foundation.

How to include Rotary in your estate plan

One of the most popular ways to include Rotary in an estate plan is through a will or codicil. Whichever method works best for you, please remember to use the official legal name, **The Rotary Foundation of Rotary International**, unless one of the following names applies in the region where you live:

- ◆ The Rotary Foundation (Canada)
- ◆ Rotary Foundation (India)
- ◆ Public Interest Incorporated Foundation — Rotary Foundation Japan
- ◆ Rotary Foundation of the United Kingdom

Here are a few examples for your adviser to consider:

- ◆ For a general gift of a certain percentage or portion of your estate: "I give to The Rotary Foundation of Rotary International one-fourth of my estate."
- ◆ For a gift of a specific asset: "I give 500 shares of [name] stock to The Rotary Foundation of Rotary International."
- ◆ For a contingent bequest, which takes effect only when certain conditions are met: "In the event my spouse does not survive me, I give to The Rotary Foundation of Rotary International the remainder of my estate."
- ◆ For a residual bequest, which directs the disposition of all or a portion of whatever remains after all other required amounts are paid: "I give the rest, residue, and remainder of my estate to The Rotary Foundation of Rotary International."

As always, remember to consult independent tax and legal advisers before making any charitable gift.

How your legacy carries on

A gift to **Endowment-World Fund** allows the Trustees to direct support where it is most needed around the world. A gift to **Endowment-SHARE** allows your Rotary district to direct a portion of the spending along with a portion going to World Fund. You may also support one or more of the **areas of focus**. Current trustee policy is to direct undesignated gifts of \$10,000 or more to World Fund.

We may share your name as one of the growing number of Rotarians and friends who are providing future gifts to the Foundation, unless you request anonymity. Rest assured the details and amount of your commitment will always remain confidential.

Personalizing your fund

You can personalize your legacy with a separately identified fund that bears your name, your family's name, or the name of a loved one, and with larger gifts it may be possible to more-narrowly direct the use of the funds to specific programs or regions. The minimum amount to establish a named fund is \$25,000.

Let Rotary recognize you

The Rotary Foundation Trustees are pleased to share their gratitude and offer membership in special societies.



Legacy Society

Individuals and couples who have substantiated a future gift of \$1 million or more to the Endowment are listed in Rotary's annual report and are invited to exclusive Rotary International and Foundation events. **Legacy Society** members also receive special recognition items and all the benefits provided to Bequest Society members.

Bequest Society

Those who have made commitments for future gifts of \$10,000 to The Rotary Foundation are invited to join the **Bequest Society**. Each level of giving includes the benefits offered to Bequest Society members at the preceding levels.

- ◆ \$500,000 — Special seating and registration benefits at the Rotary International Convention
- ◆ \$250,000 — Posthumous induction into the Arch Klumph Society
- ◆ \$100,000 — Customized Rotary's Promise crystal
- ◆ \$50,000 — Separate named endowed funds directed to two areas of focus or districts
- ◆ \$25,000 — Rotary's Promise crystal and named endowed fund
- ◆ \$10,000 — Bequest Society pin and an exclusive art piece suitable for framing

Rotary is pleased to confer **Benefactor** status on those who have made \$1,000 commitments for future gifts to the Endowment in their estate plans or outright gifts of \$1,000 to the Endowment. Benefactors receive a certificate and a special insignia to wear with a Rotary pin.

Clubs with 100% member support of the Endowment are eligible to request an electronic **Rotary's Promise Club** certificate. Qualifying support may be a \$1,000 commitment for a future or current gift to The Rotary Foundation Endowment.