

Every once in a while things go your way,
and this is one of those times!

You can now use your Individual Retirement Account (IRA) to make a one-time gift to The Rotary Foundation, receive payments for you and/or a spouse for life, and reach major donor status, all while knowing your legacy is secure. How is that possible?

Congress recently changed the law so you can do a one-time QCD from your IRA to establish a Charitable Gift Annuity. There are a few restrictions, but nothing we can't work out together!



Perhaps you've already heard about the Qualified Charitable Distribution (QCD) option for your IRA?

Simply put, a QCD is a tax-neutral way to make gifts to charity each year.

CGAs are a time-tested, simple way to provide you and your spouse a fixed payment for the rest of your lives and provide you with Major Donor recognition now for your generosity.

YOU:

- Have reached your 70½th birthday
- [Click here](#) to ask for a sample of the possible benefits of lifetime payments
- Let us know the programs at Rotary that you want to support through the Endowment, like supporting your district through SHARE
- Use your IRA administrator's form or your IRA checkbook to make a Qualified Charitable Distribution of between \$10,000 and \$50,000 to The Rotary Foundation
- Send or have it sent to a special address* at Rotary headquarters for proper processing

ROTARY:

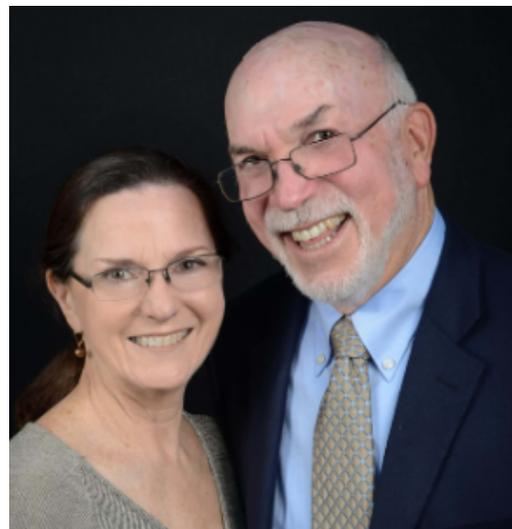
- Prepares the final CGA paperwork for your review and signature
- Presents you with your new or increased Major Donor recognition pieces
- Makes timely payments directly into your bank account for the remainder of your and your spouse's lifetimes
- Secures and honors your legacy through the Endowment by using your gift on the programs you know and love

*** The address for mailing the IRA distribution is different depending upon if you are making a QCD, funding a Charitable Gift annuity, or reporting that Rotary has been named as the beneficiary. Please work with a staff member to get the right address!**

Orrin and Carolyn Mahoney share their motivations for funding a Charitable Gift Annuity.

"Rotary is an important part of our lives and we know firsthand the impact members make around the world through The Rotary Foundation.

We have always wanted to give at a higher level but we weren't in a position to do so until the opportunity to make a charitable gift annuity with our retirement assets became available. By giving in this way, we were able to make a meaningful charitable gift without outliving our means, show our commitment to The Rotary Foundation by becoming Level 3 Major Donors, and know that our planning today will ensure a steady stream of DDF to our district in the future so that members can continue making an impact for generations to come.



A Planned Giving Officer helped us each step of the way and made it easy – we hope others who are in a position to do so will follow our example."



The Richters had a great experience as well.

"The Foundation's Planned Giving staff were, as usual, timely, helpful, and effective. Everything went exceptionally smoothly in setting up the CGA and transferring the assets."

When you're ready ...

... call or email us to start a conversation about how you can use between \$10,000 to \$50,000 of your IRA without any federal tax on the transfer, secure your financial future, AND provide major support for your favorite activities of The Rotary Foundation.

We look forward to speaking with you!

The Rotary Foundation Planned Giving Team

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For U.S. tax purposes only. All amounts in US dollars. This is not a solicitation. Consult with tax and legal advisors before making any gift to charity. This information is provided for educational use only, not for any individual to rely upon for tax, legal or financial advice. The charitable gift annuity is offered to US taxpayers with the exception of Alabama and Hawaii.