



# 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.

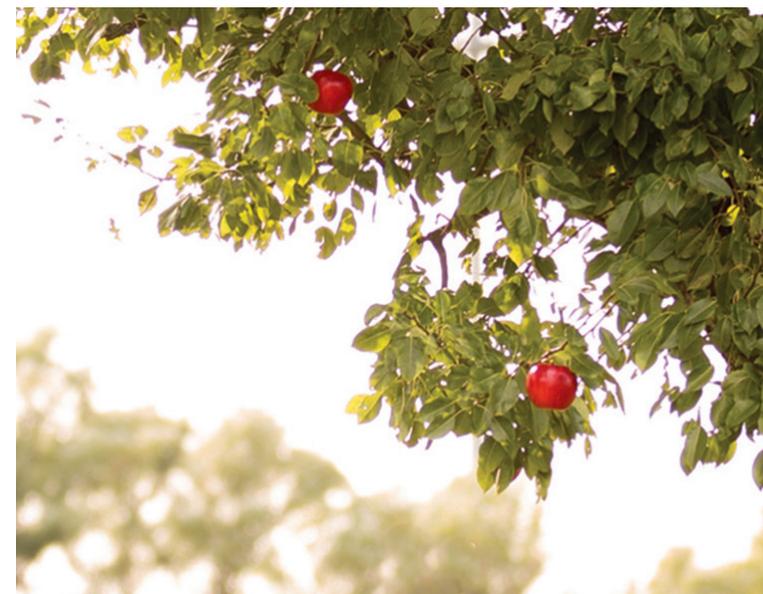
We may share your name as one of the growing number of Rotarians and friends who are providing future gifts to the Foundation, unless you request anonymity. Rest assured the details and amount of your commitment will always remain confidential.

## 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-percent 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