



## Unlock security for you and provide hope for others around the world

If you are like most Rotarians, you have experienced a lifetime of successes and challenges. You have seen Rotary grow and expand its reach. You understand the importance of providing long-term support that will continue to improve the lives of future generations. Rotary is your partner, now and into the future. You can make a gift today and Rotary will provide fixed payments to you and your loved one for life and then support Foundation programs in perpetuity. Your gift could turn cash or securities into an income stream. With rates ranging from 4 to 8 percent, a charitable gift annuity may help you unlock the income potential of low-yielding assets.

### **What is your Rotary passion?**

We encourage you to designate how the earnings on your gift will someday be used. You may elect to support children or disease prevention, for example. Or you might prefer that a portion of the earnings benefit your district each year. How will you change the world? It is your choice — it is your Rotary legacy.

**Continue reading to learn more about how Rotary is your partner for a better future.**

## Two goals, one gift



The Rotary Clubs of Palo Alto, USA and Bombay Metropolitan, Maharashtra, India partnered with another Indian charity to conserve the area's monsoon rainwater and prevent wells from drying up later in the year.

### **One special gift may accomplish your financial and charitable goals.**

Enjoy the security of fixed payments for life and the satisfaction of knowing you are helping Rotary build a better future for individuals around the world.

Giving in this way is quite simple. You donate cash or appreciated securities to Rotary in exchange for Rotary's agreement to make fixed payments to one or two beneficiaries for life. Your payment rate depends on the beneficiaries' ages when the annuity is funded. Payments may be made monthly, quarterly, or annually by direct deposit to a checking or savings account.

After all lifetime payments have been made, the balance of your gift annuity will be used to provide ongoing support for Rotary Foundation programs through The Rotary Foundation's Endowment. Whatever program you choose, your gift will continue making a difference in the world.

# The Many Benefits of a Charitable Gift Annuity with Rotary

- ✓ Provide lifetime payments for you and/or loved ones that will not change with interest rate or market changes
- ✓ Supplement retirement assets with fixed payments
- ✓ Unlock additional income from appreciated stock or low-yielding investments
- ✓ Reduce or delay capital gains tax that would be due if you sold the assets outright
- ✓ Qualify for a charitable income tax receipt at the time you make your gift
- ✓ Receive a portion of each payment free of federal income tax for a period of time
- ✓ Receive payments that are backed by the unrestricted assets of The Rotary Foundation
- ✓ Receive Major Donor or Arch Klumph Society recognition for the full amount of your gift

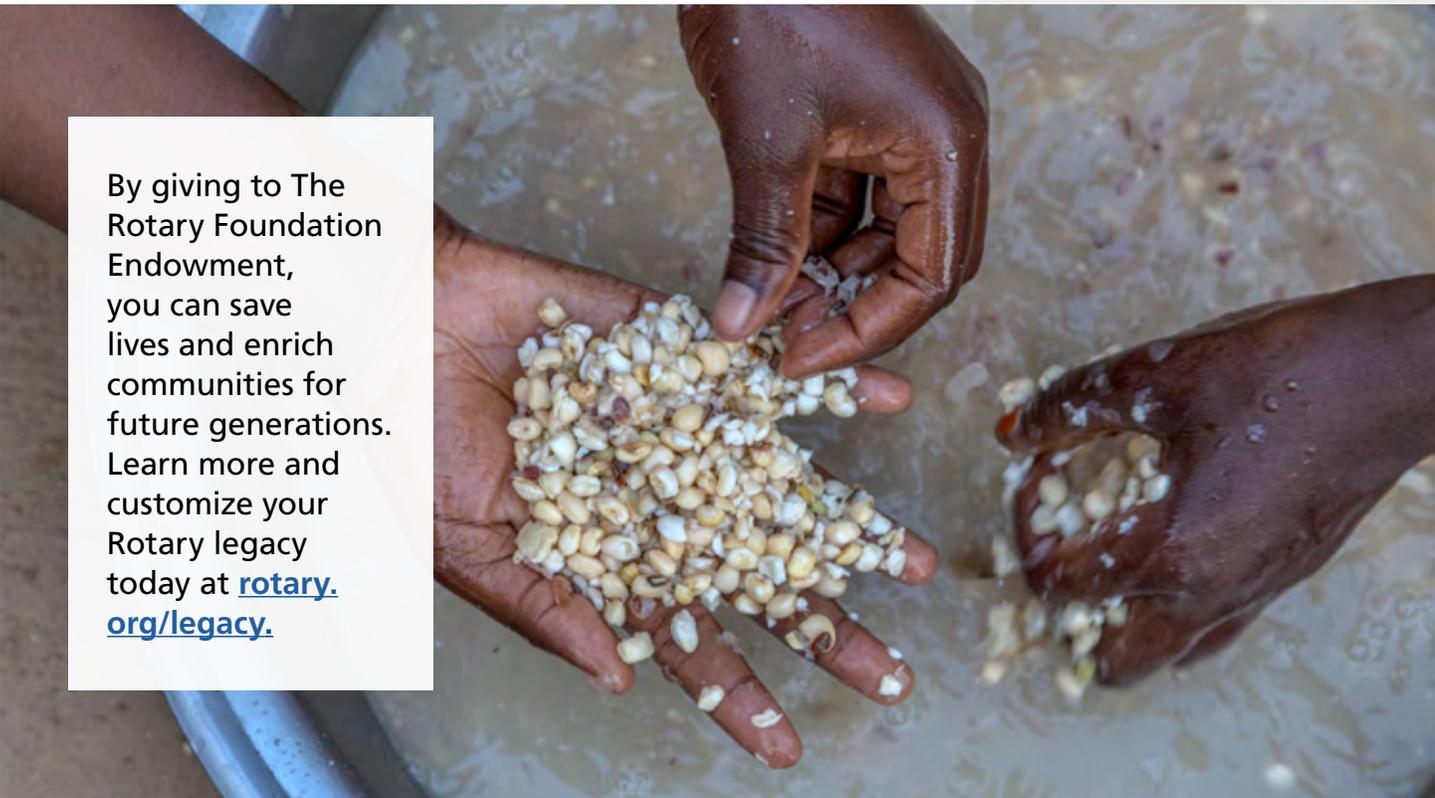
## Who Can Benefit?

You, spouse, partner, sibling, child, friend, or others

Minimum Gift Amount:  
**\$10,000**

Minimum Beneficiary Age: **50**

Number of Annuitants:  
**1 or 2**



By giving to The Rotary Foundation Endowment, you can save lives and enrich communities for future generations. Learn more and customize your Rotary legacy today at [rotary.org/legacy](https://rotary.org/legacy).



**Binish Desai, of the Rotary Club of Vibrant Valsad, India.**

Rotarian and Youth Exchange alumnus Binish Desai is an innovator and social entrepreneur who creates products from industrial and domestic waste. He uses his Rotary connections to help women in rural communities become successful entrepreneurs. With the help of his club, he formed The Women Empowerment Centre, where women learn how to use recyclable waste to make and sell lamps, clocks, and smartphone covers.

When you make an outright gift to the Endowment or a commitment to give in the future, the Rotary Foundation Trustees are pleased to share their gratitude and offer membership in special societies.

**Arch Klumph Society** membership is reserved for individuals or couples who provide \$250,000 or more to The Rotary Foundation outright or through cumulative qualifying gifts. Major Donor recognition is awarded to those who have given \$10,000 or more outright.

**Legacy Society membership** is provided to those who have substantiated a future gift of \$1 million or more to the Endowment.

**Bequest Society** membership is provided to those who have committed \$10,000 or more in financial support, usually through an estate plan or beneficiary designation. These donors receive special updates, invitations, and other materials including an exclusive pin.

**Naming opportunities** are available for outright gifts and commitments for future gifts of \$25,000 or more. Your fund will bear your name or that of a loved one and will carry on your Rotary legacy. Financial updates available to your district will let Rotarians of the future know that your generosity supports their projects. Additional customized naming and gifting opportunities are available.

Randy Roberts recently shared with his Rotary club the positive experience he and his wife Carol have had with charitable gift annuities (CGAs) through The Rotary Foundation.



*Randy and Carol Roberts*

“I joined the Downtown Fort Wayne, Indiana Rotary Club 49 years ago. My grandfather, uncle, uncle’s brother-in-law and father-in-law were all members. Most of my closest friends are in Rotary, and the weekly programs help me stay informed on local and international issues. What I like most about Rotary is being in a room full of people who live ‘service above self.’ Rotary gives me a chance to serve others beyond what I can do by myself.”

Randy went on to explain what drew him to the idea of considering a charitable gift annuity and that although at first he wanted his gifts to be anonymous, the benefits and positive experience he has had in setting up CGAs at Rotary made him want to encourage others to consider a Rotary CGA!

“I found out that my wife and I could set up a charitable gift to support areas of focus that we were passionate about – Water, Sanitation, and Hygiene for Carol and Peace for me -- and also receive lifetime payments, tax benefits, and Arch Klumph Society recognition. It was a no-brainer. Opening a CGA with an organization that I love and trust rather than with a bank or insurance company appealed to me.”

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“I don’t think that a lot of Rotarians know how great CGAs are, so I will keep spreading the word.”

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“Carol and I have since established two more CGAs. We did our second to reinforce that supporting Rotary’s newest area of focus, the environment, was a good thing to do. We hoped that our gift would inspire others. We decided to add a 3rd CGA to further strengthen our commitment to Rotary’s seventh area of focus. Achieving Foundation Circle level recognition with this gift was a nice additional benefit! All three of these gifts made sense financially, too. I don’t think that a lot of Rotarians know how great CGAs are, so I will keep spreading the word.”

Randy appreciates that the staff at The Rotary Foundation take the relationships with donors and Rotary’s needs seriously when setting up the gift annuity contract and gift agreement. He felt that the Planned Giving team members sincerely aim to assist donors in achieving what they want, which in his case was a blend of philanthropic, financial, and estate planning goals.

The Rotary Foundation thanks Randy and Carol Roberts for their tremendous generosity and for wanting to share their thoughts about this beneficial gift type with other Rotarians! Their CGAs will help provide life-changing support for communities around the world for generations to come.



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The Rotary Foundation has a 100-year record of growth and impact. Fueled by generous friends, leaders, and problem-solvers who have a passion for positive change, Rotary is a charity you can trust to tackle the world's greatest humanitarian challenges and achieve your hopes for the future.

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## **GET STARTED**

[Click here](#) to connect with a member of our Planned Giving Team to talk more about how a charitable gift annuity would work for you and your family.

[Click here](#) to let us know if you would like to discuss other ways to strengthen your Rotary legacy.

## **CONTACT US**

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or

Visit [rotary.org/plannedgiving](http://rotary.org/plannedgiving) for more helpful information on gift and estate planning.