



Planned Giving – Canada

Create a Lasting Legacy through Your Estate

A gift to The Rotary Foundation's Endowment Fund creates a lasting legacy. The principal of the contribution Fund is never spent; a portion of the earnings will provide ongoing support for Rotary's life-saving and community-building programs for years to come.

How do I include the Foundation (Canada) in my estate plan?

Rotary recommends that you consult with your tax and legal advisors before making any bequest to charity. To receive the best tax benefits it is important that you specifically name **The Rotary Foundation (Canada)** in your estate plan. There are several transfer options:

- A general bequest for a certain amount or percentage of the estate;
- A specific bequest that designates a specific asset, such as 500 shares of stock;
- A contingent bequest that takes effect only under certain circumstances, such as if a spouse does not survive the donor; or
- A residual bequest that provides Rotary with the remaining amount in your estate after all other bequests and expenses have been paid.

What assets can I donate?

- Cash, stock, bonds, etc., are assets that Rotary can easily put to good use;
- Gifts of RRSP (registered retirement savings plan) may help heirs avoid unnecessary income taxation;
- Approved real estate can make an excellent charitable gift; or
- Donors can name The Rotary Foundation (Canada) as beneficiary of a life insurance policy.

How will I be recognized?

Benefactor

All donors who let Rotary know of any commitment to the Endowment Fund in their estate are recognized as Benefactors. Benefactors receive wings to wear with a Rotary or Paul Harris Fellow pin and a customized certificate.

Bequest Society

Donors who plan for a gift of U.S.\$10,000 or more are eligible for membership in Rotary's Bequest Society, which provides wearable insignia, an engraved crystal and invitations to special events. There are seven levels of recognition from U.S. \$10,000 to more than \$1 million. You may also remain anonymous.

How can I customize my Rotary legacy through the Endowment Fund?

The following options are listed in the *Your Rotary Legacy* brochure (the Bequest Society membership card) and are available for contributions of any size:

❖ World Fund

The spending portion of gifts to the World Fund provides general support, which is directed by the Foundation wherever the need is greatest. The World Fund gives every Rotary district and club an opportunity to participate in the Foundation's programs, and provides both international and local impact.

❖ SHARE

The spending portions of gifts designated to SHARE are split equally between the World Fund and the Rotary district or your choice, through District Designated Funds (DDF), that are used to participate in Foundation programs locally and globally.

❖ Global Grants

The spending portion of gifts designated to global grants will provide support to scholarships, humanitarian projects, and vocational training teams in the [area\(s\) of focus](#) you choose:

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development

❖ Rotary Peace Centers

The spending portion of gifts designated to Rotary Peace Centers provide general support for the program, which trains professionals in conflict resolution, peace studies, international relations, and disciplines in partnership with leading universities around the world.

Can I establish an endowment that carries my or a loved one's name?

Named funds are a wonderful way to pay tribute to a loved one, a spouse, or family - for today and in the future. The amount necessary to establish a named fund is US\$25,000. Endowed funds can be customized for greater specificity depending upon the amount of the gift. Please contact your Major Gifts Officer for details.

What documentation would Rotary like to have?

Please send a completed *Your Rotary Legacy* card to the address below. It is helpful for Rotary to have a copy of your plan, but it is not required. To assist Rotary in fulfilling your legacy, please consider sending the first page, the page that references Rotary and the signature page. We look forward to making your philanthropic legacy a reality

The Rotary Foundation - Planned Giving
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