



VISIONS

Charitable Estate & Financial Planning Ideas from The Rotary Foundation

WHAT IS YOUR ROTARY LEGACY?



After my 2003 PolioPlus National Immunization Days trip to Central Africa with fellow club members Peter Smith and Joop Ueffing (Rotary Club of Kentville, Nova Scotia), it was impossible to view the world in the same way. This was a life-changing experience! I saw firsthand the devastating effect of polio among older and young adults, but also saw the effect of the attempt to eradicate the disease by Rotary and partners. I saw no children with the disease.

What I did see, especially on the offshore islands of Cameroon, was the total lack of health care and medical facilities or supplies. One clinic that we visited had one nurse, virtually no supplies, and a birthing room with one rusty old birthing table and a wire spring cot without a mattress or linens, on which a young lady was laying.

Even the mainland hospitals and clinics lacked the basic hospital beds and clean linens or blankets to make patients comfortable.

Since our trip, we continue to work with our friends in Cameroon. I continue to support these projects and The Rotary Foundation every year, and I want that support to continue when I am gone.

The best way to provide perpetual support is through a bequest to The Rotary Foundation. The low administration fees and the ability to direct support toward District projects made it an easy decision.

- Greg Trefry, Rotary Club of Kentville, Nova Scotia (pictured above with his wife, Linda)



Like-Minded People Come Together to Tackle Challenges

Your generosity can support Rotary's Major Gifts Initiatives for our areas of focus, Rotary Peace Centers and polio eradication. Rotary's Major Gifts Initiatives will ensure endowments for each area of focus are in place, providing the essential future funding for our next century of service work.

FREQUENTLY ASKED QUESTIONS ABOUT ROTARY'S ENDOWMENT

What is an Endowment? Gifts to Rotary's Endowment ensure that future Rotarians will have the resources they need to design and implement sustainable projects year after year. Rotary strives to increase the value of your gift to the Endowment by preserving and investing your initial contribution and spending only a portion of the earnings. The principal of a contribution to the Endowment is never spent, but a portion of the earnings is made available annually for specific program activities.

May I direct my gift to a specific program? You may direct spendable earnings from your commitment to World Fund, SHARE, one of Rotary's areas of focus or the Rotary Peace Centers.

How can I support local projects? Gifts designated to SHARE are currently split equally between World Fund and District Designated Funds. The Rotary district of your choice uses District Designated Funds to participate in the Foundation's programs.

May I direct my gift to more than one program? Yes, your commitment may be directed to more than one program depending on the value of the gift.

How does The Rotary Foundation recognize donor gifts to the Endowment?

Two ways:

- Outright Gifts of US \$10,000 or more are recognized with the appropriate Major Donor pin and crystal. Gifts of US \$250,000 or more qualify for Arch Klumph Society membership.
- Bequest gift commitments of US \$10,000 or more are recognized with a Bequest Society pin and crystal.

What is a named endowed fund? You can personalize your legacy through a named fund within the Endowment. The separately identified fund may bear your name, your family's name or the name of a loved one. Depending upon the amount, 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 US \$25,000.

May I add to an existing endowed gift? Yes, if a named fund has already been established, you may continue to make outright major gifts directed to the Endowment to increase the value and spendable earnings impact of your gift. You, your spouse or other loved ones may also designate a future legacy gift commitment to this existing named fund.

THE ROTARY LEGACY OF LANCE SMITH



Jack Smith (Rotary Club of Mississauga West, Ontario) established a named endowed fund to honor the legacy of his son, Lance.

Jack Smith (Rotary Club of Mississauga West, Ontario) misses his son Lance every day. "We elected to create an endowed fund in Lance's name," says Jack, remembering the many Rotary functions where his son volunteered alongside his fellow club members.

"We have the spendable earnings from our endowed fund flow through SHARE. This means the earnings will be split between World Fund and funds directed to District 7080 Designated Funds. This distribution of earnings and the administrative control provided by The Rotary Foundation satisfied our needs for a memorial."

"Though we will always miss Lance in our lives, there is comfort in knowing his named endowed fund will provide ongoing good in the world."

ARCH KLUMPH SOCIETY

In April 2017, in recognition of The Rotary Foundation's Centennial, the Trustees inducted an historic total of 13 Canadian couples into the Arch Klumph Society (seen below). New AKS members were able to earmark their gifts to the Rotary causes that matter most to them. Their generous support will shape our second century of doing good in the world.

PDG Lyn and Alex Stroshin-District 5040

Dietrich and Cathleen Brand-District 5360

Bruce and Pat Williams-District 5360

PDG Tim and Sally Schilds-District 5370

Zen and Doreen Moisey-District 5370

Steve and Mary McEachern-District 5370

PDG Neil and Cheryl McBeth-District 6400

PDG William and Nancy Gray-District 7040

PDG William and Delphine Patchett-District 7070

Michael and Karen Parker-District 7070

Devon and Linda Biddle-District 7070

Joop and Susan Ueffing-District 7820

One anonymous couple



EASY WAYS TO CREATE YOUR ROTARY LEGACY

A gift to the Endowment lets you continue your support of Rotary into the future. Your gift will help Rotary improve health, support education and alleviate poverty in perpetuity.

A properly planned legacy gift can also result in tax and other financial benefits for your estate and heirs. It is important to consult your lawyer and other professional advisors when considering how charitable gifts might impact your overall estate plan.

Provide for a Bequest in Your Will or Other Estate Plan.

You may choose to include a gift of a specific dollar amount, a percentage of what is left after providing for relatives or even a particular asset. If you already have a will you may add a bequest through a simple codicil or amendment naming The Rotary Foundation (Canada).

Make The Rotary Foundation (Canada) the Beneficiary of a Retirement Plan.

Simplify matters for your loved ones by directing all or a portion of what remains in your retirement accounts to charity and leaving more tax-favored assets to your heirs. You may designate The Rotary Foundation (Canada) as beneficiary of your RRSP or RRIF without changing your will. Your plan manager can provide the form you need.

Turn Unneeded Life Insurance into a Lasting Legacy.

You can also make The Rotary Foundation (Canada) beneficiary of life insurance policies without changing your will or other estate plans. As your financial and family circumstances have changed over the years, you may have policies that are no longer needed. They can often be a good choice to fund charitable gifts.

MAKING PEACE A REALITY

Sandy and Jane MacKay enjoy a peaceful life in Medicine Hat, Alberta where Sandy has been a committed Rotarian for 40 years, but the MacKays know that not everyone is this lucky. As District Governor in 2002-03, Sandy was introduced to a young woman named Crystal Procyschen. She wanted to be considered for a scholarship so she could be trained to reduce conflict between the Palestinians and the Israelis.

Sandy told her all about the Rotary Peace Centers program and encouraged her to apply. Today Crystal is a Peace Fellow graduate from International Christian University Japan (2003-05). She works as the Chargé d'Affaires/Head of Office of the Canadian Department of Foreign Affairs, Trade and Development office in Baghdad, Iraq.

Sandy and Jane decided to establish a named endowed fund supporting the Peace Centers program. "It is important to seek out bright people who have a willingness to be engaged in the peace effort," Sandy says. "We are helping to put them in areas where they can make a big difference." The MacKays hope that others will join them in this effort to make peace a reality.



*Jane and Sandy MacKay
(Rotary Club of
Medicine Hat, Alberta)*

GENOCIDE SURVIVORS RECONCILED

Rotary Peace Fellow Krystal Renschler is a mediator and conflict resolution practitioner working in Metro Vancouver with Reconciliation Canada. Selected as a Peace Fellow by the Rotary Club of Oak Bay, District 5020, she worked in Canada on Aboriginal restorative justice. Graduating in 2016 from the Rotary Peace Centers University of Uppsala, Sweden, Krystal conducted research in Cambodia on post-genocide memorialization efforts and their impact on healing following mass atrocity. "One of my most moving memories during my research in Cambodia," says Krystal, "was meeting a former member of the Khmer Rouge who drove victims to the killing fields and later befriended a man whose parents had been lost to the genocide. The two worked together in the Tuol Sleng Genocide Museum in Phnom Penh. They found healing at the museum telling the story of the genocide."

"The Rotary Peace Fellow network is one of the most important parts of being a Peace Fellow," says Krystal. The Rotary Foundation is forming a Peace Fellow alumni association to grow the network of Peace Fellows.



Krystal Renschler (right)

FOR MORE INFORMATION

Please return the enclosed reply card or visit rotary.org/legacy to learn more or notify Rotary of your commitment.

The Rotary Foundation
1560 Sherman Avenue
Evanston, IL 60201 USA
+1-847-866-3100
legacy@rotary.org

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