

VISIONS

Charitable Estate & Financial Planning Ideas from The Rotary Foundation



**UNLOCK
INCOME
WHILE PROVIDING
HOPE
AROUND THE
WORLD THROUGH
ROTARY**

The Rotary Foundation is celebrating 100 years of doing good in the world. This centennial year is the perfect time to establish your own personal legacy and empower Rotarians to serve humanity for centuries to come. Visit www.rotary.org/foundation100

In 1917, Rotary International President Arch C. Klumph proposed an endowment “for the purpose of doing good in the world” and The Rotary Foundation was born. One hundred years later, Rotary has touched the lives of millions of people, providing health, education and opportunity where it is needed most. We hope that you take great satisfaction in the impact you have had in your own community and around the world through Rotary’s Foundation.

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 spouse for life and then support

Foundation programs in perpetuity. This gift, a charitable gift annuity, turns cash or stock into an income stream. With rates ranging from 4 to 9 percent, a 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 water projects, or education, for example. Or you might prefer that a portion of the earnings go to your district each year. Your choice — your legacy. Help celebrate Rotary’s century of strength and compassion with your gift today.

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



Rotarian Jorge Aufranc visits Misioneros del Camino, an orphanage in Sumpango, Guatemala, and a project of his club, the Rotary Club of Guatemala Sur. With help from The Rotary Foundation and the Rotary Club of Northbrook, Illinois, the orphanage now has a new water well, dormitories, and an on-site neurological clinic for disabled children.

TWO GOALS, ONE GIFT

You may wish to accomplish your financial and charitable goals with one special gift. Enjoy the security of fixed payments for life and the satisfaction of knowing you will be 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.

After all lifetime payments have been made, the balance of your gift annuity will be used to provide ongoing support for Rotary Foundation programs. Whatever program you choose, your gift will go on giving!

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
- 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
- qualify for a charitable income tax deduction 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 recognition for the full amount of your gift

WHO CAN BENEFIT?

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

Minimum Beneficiary Age **50***

Number of Annuitants **1 or 2**

*Beneficiaries: You, spouse, partner, sibling, child, friend, or others.

THANK YOU FOR YOUR GENEROUS SUPPORT

The Rotary Foundation welcomes the opportunity to express its appreciation for your generosity should you decide to fund an annuity or make a provision in your estate plans. When you share with others that you are one of a growing number of Rotarians who are providing gifts or a commitment to the Foundation, you may just encourage someone else to follow in your footsteps.

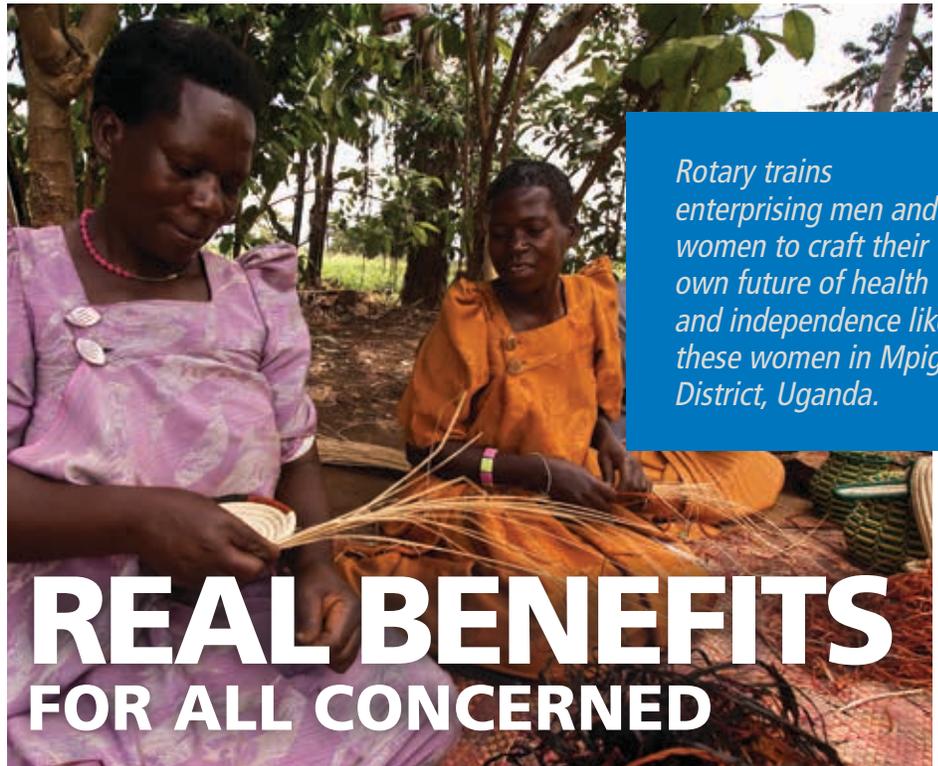
Rotary recognizes outright gifts and charitable gift annuity contributions with **Major Donor** recognition.

Those who commit to a gift of U.S. \$10,000 or more will receive membership in the **Bequest Society**, which provides special updates, invitations and other materials including an exclusive pin and engraved crystal.

Donors who contribute or commit \$25,000 or more qualify for a named fund within Rotary's Endowment. This fund can be named after the donors or loved ones and carries forward their personal Rotary Legacy for years to come.

Join the many generous Rotarians who have made commitments to the future of Rotary through the Endowment Fund by planning your Rotary legacy today.

We look forward to working with you to celebrate Rotary's century of strength and compassion.



Rotary trains enterprising men and women to craft their own future of health and independence like these women in Mpigi District, Uganda.

REAL BENEFITS FOR ALL CONCERNED

A LASTING LEGACY

Past District Governor David and Shirley Fihn (Rotary Club of Detroit Lakes-Noon, MN) funded their first gift annuity with Rotary in 1993. They have been so pleased with the benefits that they made a series of gifts to support Rotary and supplement their retirement income. In doing so, they have built a strong legacy and financial security for their family.

David's support for Rotary's Endowment is a natural outgrowth of his service through Rotary. In 2005 he was awarded the Service to Humanity Award in recognition of his dedication to providing dental care to refugees and communities in need during more than 14 mission trips abroad. The Fihns enjoy knowing that the remainder

of their annuities will support the Endowment Fund-World Fund, providing ongoing support for Rotary Foundation projects.



PDG David and Shirley Fihn

LIVE YOUR ROTARY DREAM

Bill and Linda Richter (Rotary Club of Manhattan, KS) knew they were “doing well by doing good” when they made gifts to Rotary that balanced their charitable and financial goals. Rotary’s gift annuities provide them with guaranteed payments for life and the satisfaction of knowing the impact of their generosity will continue beyond their lifetimes through Rotary’s Endowment. Bill says the Endowment “is the best way to ensure that Rotary has the resources it needs to do good in the world for generations.”

Rotary’s global focus is a great fit for the Richters’ professional interests and personal values. Both taught political science at Kansas State University for more than 40 years and Bill helped launch their Office of International Programs. Bill is proud that District 5710 successfully nominated four Rotary Peace Fellows during his tenure as committee chair. Rotary recognized Bill’s dedication with the Foundation’s Citation for Meritorious Service in 2011.



Bill and Linda Richter

Gift annuities allow Bill and Linda to provide for their family now and provide for Rotary programs into the future. Today’s gift — tomorrow’s legacy. Bill and Linda recently established another gift annuity to celebrate The Rotary Foundation’s centennial. Learn how you can join them by returning the enclosed response card today.

GET STARTED!

Contact Rotary’s Planned Giving team to discuss how a charitable gift annuity might fulfill your financial and charitable goals.

Just tell us how you want your gift to help your family and build your Rotary legacy and we will prepare a no-obligation sample illustration that outlines the payments and potential tax benefits.

When you are ready to fund your gift annuity, we will give you instructions for making your contribution and prepare the paperwork for you to sign.

FOR MORE INFORMATION

KARENA J. BIERMAN, J.D. DIRECTOR OF GIFT PLANNING

The Rotary Foundation
1560 Sherman Ave.
Evanston, IL 60201
Phone: (847) 866-3100
Fax: (847) 556-2178
plannedgiving@rotary.org



Check out our easy to use web pages at:

www.rotary.org/plannedgiving

You’ll find helpful information on gift and estate planning.



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