

# VISIONS

Charitable Estate & Financial Planning Ideas from The Rotary Foundation



*District Governor  
Apostolos Mamatas  
(Rotary Club of  
Kifissia-Kefalari,  
District 2470, Greece)  
is proud to promote  
Rotary's values as a  
member of the Paul  
Harris Society.*



## LIVING YOUR ROTARY VALUES

After arriving in America with a full scholarship to study at Massachusetts Institute of Technology, Apostolos Mamatas was shocked to find himself working odd jobs in order to survive. An unfortunate delay in scholarship funding forced him to sleep wherever he could, often outside at the Port of Boston. His luck changed when a Rotarian on campus offered him a place to stay.

Apostolos enjoyed the hospitality of his generous host for weeks, eventually attending a Rotary club meeting where members coincidentally were discussing how to help the poor and homeless. Apostolos had plenty of insight on the subject of poverty. In addition to his struggle in America, his upbringing in Greece was concurrent with an economic depression caused by World War II and a subsequent civil war. He left that meeting with "mixed feelings of joy, admiration, sadness, and jealousy," says Apostolos, "because at that time I wasn't able to join Rotary."

When he returned to Greece in the early 1990s he helped establish the Rotary Club of Ilioupoli, later joining the Rotary Club of Kifissia-Kefalari when he moved in 2013. Today, he is the founder, owner, and CEO of ADM Consulting Engineers in Athens. As Governor of District 2470, Apostolos remains deeply committed to Rotary's values and supporting the Foundation. "In this difficult economic period for the Greeks, I consciously chose to join the Paul Harris Society," he says. "I believe the level of contribution does not matter; everyone can offer as much as they can afford."

**Read on to learn more about how you can support your favorite Rotary causes with a gift that celebrates The Rotary Foundation's Centennial!**

# GIVING FROM THE HEART, YEAR AFTER YEAR

For 100 years, The Rotary Foundation has been supporting Rotarians' work to create sustainable solutions to our world's most pressing needs. Give the gift of Rotary today and be a part of the positive change Rotarians are making in your community and around the world. Every gift makes a difference.



The **PAUL HARRIS SOCIETY** (PHS) is a formal recognition program to honor generous Rotarians who elect to contribute \$1,000 or more annually to The Rotary Foundation. Today, this vibrant global community of more than 17,000 donors is paving the way for a better world.

Rotarians join PHS for many reasons. Past District Governor James Springer (Rotary Club of Columbia Breakfast, Tennessee) believes the Paul Harris Society "helps make Service Above Self a way of life." For Paul Harris Society Coordinator Bill Dees (Rotary Club of Hannibal, Illinois), "It is about taking action—doing something now that will make a difference in a person's life."

Since Rotary formally adopted the Paul Harris Society in 2013, Paul Harris Society members have donated \$58.8 million to The Rotary Foundation. By joining this strong network of dedicated, action-minded Rotarians, you can create meaningful change. To enroll, visit [rotary.org/paulharrissociety](http://rotary.org/paulharrissociety).

## WHAT YOUR GIFT SUPPORTS

### \$10 Mosquito bed net

Bed nets provide a safe, peaceful night's rest in countries like Uganda, where malaria is a major health concern.



### \$26.50 Books

Share your love of reading by paying for books to start libraries in classrooms and community centers around the world.



### \$50 Water filter

In rural Guatemala, deadly waterborne diseases are common. Personal water filters fill the need for clean water.



### \$85 Business classes

In the United States, business classes teach low-income entrepreneurs the skills they need to be successful.



### \$100 Sewing machine

With a sewing machine, a microloan, and some training from Rotary, entrepreneurs can turn their sewing skills into a thriving business.



### \$500 Anti-bullying campaign

No child should live in fear of being bullied. Your gift helps communities create a safe and positive atmosphere where children can thrive.



### \$1,000 Midwife vocational training

In remote areas, midwives provide vital prenatal care. Mothers who receive care during pregnancy are more likely to have safe births and to seek medical care for their children.



Your gift supports projects like those described here but may not purchase the specific items listed.

*Gifts to the Endowment provide ongoing support for the causes that are most important to you. Donors dedicated to the health care of new mothers and their children ensure the success of projects such as this Rotary-sponsored health clinic in Rio de Janeiro.*



# MAKE AN IMPACT NOW AND FOREVER

Your gifts to the Annual Fund help people around the globe live better lives today. Planning a gift to Rotary's Endowment supports these same life-changing programs forever.

**ANNUAL FUND** contributions go through a three-year investment cycle. After this period, half of the funds are given to the World Fund and half are returned to your district as District Designated Funds, which may be used to support small-scale, short-term activities that address needs in your community and communities abroad.

Gifts to the **ENDOWMENT** ensure that The Rotary Foundation can meet the world's vital needs for generations to come. Rotary preserves the contributions, which then generate millions of dollars each year to improve lives in communities worldwide.

Past District Governor Bill Dimond (Rotary Club of Kalamazoo Sunrise, Michigan) speaks to the benefits of

giving to both funds. He achieves his charitable goals through a series of IRA gifts to the Endowment, which support Rotary Peace Centers, while also donating to the Annual Fund to fulfill his Paul Harris Society membership. "I give to the Annual Fund to support the Foundation's immediate needs," he says, "and on the other side of the coin, the Endowment ensures that Rotary can address these needs long into the future."

Donors can utilize both funds to maximize their Rotary legacy. For example, a gift of \$25,000 to Rotary's Endowment can generate \$1,000 for SHARE annually into the next century and beyond. In addition to securing Paul Harris Society-level giving in perpetuity, a \$25,000 fund will bear your name or that of a loved one and carry on your Rotary legacy. Annual financial updates to your district ensure that Rotarians of the future know your generosity helps make their projects possible.

	GIFT	RECOGNITION
<b>Outright Gift to the Annual Fund</b>	\$1,000	<ul style="list-style-type: none"> <li>• Paul Harris Society membership upon enrollment</li> <li>• Potential for Major Donor Level 1 (after 10 years of \$1,000 gifts)</li> </ul>
<b>Commitment or Gift to the Endowment</b>	\$25,000	<ul style="list-style-type: none"> <li>• A fund in your name or that of a loved one</li> <li>• Bequest Society membership, if included in your estate plans, <b>or</b></li> <li>• Major Donor recognition, if given outright today</li> </ul>

# DOUBLE YOUR IMPACT WITH MATCHING GIFTS

Your employer may match your gifts to The Rotary Foundation. In three easy steps, you can double your impact and increase funding for Rotary projects.

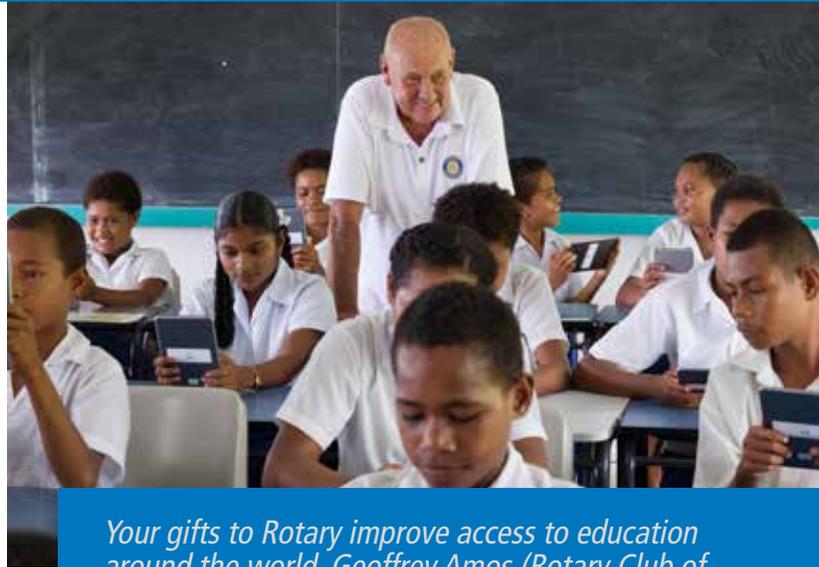
1. Visit [rotary.org/matchinggifts](http://rotary.org/matchinggifts) to learn about your company's matching gift policy
2. Contact your company's Human Resources department to learn more about requesting a match
3. Email [annualfund@rotary.org](mailto:annualfund@rotary.org) with the details of your matching gift request

To recognize your vital role in procuring these gifts, you will receive Paul Harris Fellow recognition points and your club will receive credit for the match amount.

**Retired?** Many companies still match charitable contributions from their retired employees.

Also, if you are age **70½ or older**, you may wish to consider supporting The Rotary Foundation with IRA rollover gifts. This tax-free charitable giving option allows you to make gifts directly to The Rotary Foundation from a traditional IRA up to a total of \$100,000 per person, per year. Additionally, by giving directly from your IRA, your gift will count toward your Required Minimum Distribution. For more information on IRA gifts, visit [rotary.org/plannedgiving](http://rotary.org/plannedgiving).

**The dedication and foresight of Rotarians more than 100 years ago helped make The Rotary Foundation's success possible. The next century of service will be shaped by what you do today.**



*Your gifts to Rotary improve access to education around the world. Geoffrey Amos (Rotary Club of Taveuni Island, Cakaudrove, Fiji) watches students learning to use electronic devices that will help them compete in today's technology-based job market.*

## FOR MORE INFORMATION

Rotary is happy to help you or your advisers explore how you can support your charitable goals for generations to come. To learn more about the Paul Harris Society, please visit [rotary.org/paulharrissociety](http://rotary.org/paulharrissociety) or email [annualfund@rotary.org](mailto:annualfund@rotary.org). For details on an IRA rollover or planning a gift to Rotary's Endowment, please contact [plannedgiving@rotary.org](mailto:plannedgiving@rotary.org). You will also find more helpful information on gift and estate planning online at [rotary.org/plannedgiving](http://rotary.org/plannedgiving).



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