

Canada

The Rotary Foundation
P.O. Box 9988
Postal Station A
Toronto, ON
M5W 2J2 Canada

South Asia

Rotary International
Thapar House
124 Janpath
2nd Floor, Central Wing
New Delhi 110 001
India

Europe and Africa

Rotary International
Witikonstrasse 15
CH-8032 Zurich
Switzerland

South Pacific/Philippines

Rotary International
McNamara Centre
Level 2
100 George Street
Parramatta, NSW
Australia 2150

Great Britain and Ireland

Rotary International
Kinwarton Road
Alcester, Warwickshire
England B49 6BP

United States

The Rotary Foundation
P.O. Box 75133
Chicago, IL 60675-5133 USA

A Benefactor of The Rotary Foundation is anyone who informs the Foundation in writing that he or she has made provision in his or her will, or other estate plan, naming the Foundation's Permanent Fund as a beneficiary; or anyone who makes an outright gift of US\$1,000 or more to The Rotary Foundation's Permanent Fund. The Rotary Foundation appreciates information about commitments from which it will benefit in the future. We recognize the highly personal nature of these commitments. Unless we receive other directions from you, Benefactor Recognition will be sent to your club president. The Trustees are grateful for your gift and for your permission to publish your name as a Benefactor so that your example may inspire others.

Designating the use of your gift

Unless you specifically direct otherwise, your bequest will be placed in the Permanent Fund.

You also have options as to the purpose for which the annual spending portion of your bequest will be used. You can direct that the annual spending portion from your bequest be placed in the World Fund, where it will generate support for an array of Foundation programs. Or, if your gift is directed to the *SHARE* system, your Rotary district may help direct the spending from your bequest to programs it selects.

Bequests which are undesignated or which give discretion to The Rotary Foundation Trustees will be placed in the Permanent Fund, and the annual spending portion will be directed to the World Fund for use where the need is greatest.

Let us help you — and thank you!

Whichever of these forms and purposes you choose for your bequest, The Rotary Foundation is able and eager to assist you. At your request, a representative of the Foundation will be happy to meet with you and, if you wish, with your legal and financial advisers, to discuss your goals and refine the wording of your bequest or trust.

When you have completed your will or trust (or added provision for the Foundation in them), we hope you will let us know so we can express our thanks! You may use the card attached for this purpose. With your permission, we will list your name among the growing number of committed Rotarians who have provided for future gifts to the Foundation, to encourage others to take this important step.

If you would like to know more about ways to give, please contact your district Foundation chair or the Foundation's Fund Development office. With your help, we can make the world a better place.



No one can tell us what Rotary will be tomorrow, but one thing is inevitable: what Rotary will be tomorrow depends upon what *we* Rotarians do today.

Arch C. Klumph,
1917, Sixth President,
Rotary International

...tomorrow depends upon what we do today.



If you have questions, please contact:

Planned Giving Supervisor
Fund Development Department
The Rotary Foundation
of Rotary International
One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
Telephone: (847) 866-3000
Fax: (847) 328-5260
E-mail: plannedgiving@rotaryintl.org
www.rotary.org

Securing the Future



*Your Bequest to
The Rotary Foundation*



The Rotary Foundation

I expect my gift will amount to US\$ _____.
 (Bequest commitments of US\$10,000 or more qualify you for membership in the Bequest Society. Additional information on the Bequest Society can be obtained at www.rotary.org.)

My Benefactor commitment to The Rotary Foundation Permanent Fund will be in the form of:

Will/Bequest Upright Gift Other _____

I designate that the spending portion of my gift will be applied*:

at the Trustee's discretion (World Fund) through SHARE (District Designated Fund)

*Should no designation be specified, the Trustees will use it for programs supported by the World Fund.

Name _____

Please print or type name as you wish it to appear on the Benefactor certificate.

District _____ Rotary Club _____

Address _____ Date _____

Telephone _____ E-mail _____ Date of Birth ____/____/____

Please return this portion of the card to the appropriate address listed on the reverse side.

A **specific bequest** directs that the Foundation is to receive a specific piece of property: "I give . . . 500 shares of XYZ stock."

A **residual bequest** designates all or a portion of whatever remains after all debts, taxes, expenses, and other bequests have been paid: "I give . . . 50 percent of the rest, residue, and remainder of my estate . . ."

A **contingent bequest** takes effect only under certain conditions: "In the event that my spouse does not survive me, I give to The Rotary Foundation of Rotary International, an Illinois not-for-profit corporation, the sum of . . ."

Naming your fund

If your bequest totals US\$25,000 or more, you may establish a named fund within the Permanent Fund. The fund could bear your name and that of your spouse, or the name of another family member, friend, or colleague. Though commingled with other funds for investment purposes, your fund will be separately identified in the Foundation's records. You can also use your will to designate someone to receive stewardship reports on your gift, so that others will know the good that your gift is accomplishing.

Here is an example of language creating a named fund:

"I give to The Rotary Foundation of Rotary International, an Illinois not-for-profit corporation [indicate the amount or property to be given] to establish the John and Helen Smith Endowed Fund within the Permanent Fund."

Living trusts

Perhaps you have already created a living trust and transferred many of your assets to it. The assets within such a trust will not be subject to probate. The trust agreement of this type acts like a will, in that it specifies the individuals and organizations to receive the trust estate. All of the above designations to benefit The Rotary Foundation may be included in a living trust agreement, just as in a will.

Your gifts to The Rotary Foundation can advance this dream.

By making a gift through your will — a bequest directed to The Rotary Foundation's Permanent Fund — you can continue your leadership toward a better world even beyond your own lifetime. Such a bequest contributes to a solid funding base that will benefit the Foundation's programs in perpetuity.

Thus you can help to support and extend Rotarians' international service as we prepare for our second century. Most importantly, the will you write today is your opportunity to provide for family and loved ones as well as your means to continue your vision for Rotary's future. Your will is your opportunity to:

- ↪ Use your accumulated assets as you see fit
- ↪ Ease the transition of your passing for those who survive you
- ↪ Record your wishes now, and retain the power to change them as your circumstances change, since your will is fully revocable while you live
- ↪ Honor someone with a named gift
- ↪ Support charitable institutions in which you believe by transferring assets at a time when you will no longer need them

In the United States and some other countries, your bequest to The Rotary Foundation may bring a reduction of estate tax. You should discuss this aspect of your gift planning with your legal and financial advisers.

If you presently have a will, you can easily add what's known as a "codicil" or amendment to provide a bequest to The Rotary Foundation. If you don't have a will, it will be to your advantage to take this step now. It is neither difficult nor expensive.

The following paragraphs outline typical ways in which you can make a bequest to The Rotary Foundation, and how you can further designate your gift to honor someone close to you and support Foundation programs.

A **general bequest** is for a certain percentage or fraction of the estate: "I give to The Rotary Foundation of Rotary International one-fourth of my property for the Permanent Fund."

The visionaries who began Rotary had the foresight — and the desire — to imagine a better world.

Today's Rotary Foundation carries on that vision by striving to meet head-on the ravages of illness, poverty, and illiteracy, and by addressing the world's needs for education and training, and clean, adequate food and water through an array of international humanitarian, educational, and cultural programs. One hundred percent of donors' contributions go directly to the Foundation's programs wherever Rotarians deem the need to be greatest, thanks to the generosity of Rotarians and their families all around the world.

Imagine if you can:

- ↪ A world without hunger
- ↪ A world filled with new ideas
- ↪ A world where disease is defeated
- ↪ A world with mutual respect among all faiths, races, and cultures
- ↪ A world where peace flourishes

"...WHAT ROTARY WILL BE
tomorrow
 DEPENDS UPON WHAT WE
Rotarians
 DO TODAY."