



Recognition Transfer Request

PLEASE PRINT OR TYPE

Individual Completing this Form:	Daytime Telephone Number:	Today's Date:
_____	_____ (_____) _____	_____
Rotary Club of: _____ Club No.: _____ District: _____		

When honoring an individual with Paul Harris Fellow Recognition, it is The Rotary Foundation's policy to transfer only what is needed to bring an account to the \$1,000 level. If you truly wish for the full \$1,000 to be transferred, it is recommended that you submit an additional Recognition Transfer Request.

Please transfer recognition credit from:

- the club named above
 the district named above
 the individual or business named here:

Name: _____ Amount of Transfer: _____

TRF Acct No.: _____ The type of credit being transferred is:

Available Credit
 Sustaining Member

Club President's Signature: _____
(mandatory for club credit transfer)

District Governor's Signature: _____
(mandatory for district credit transfer)

Individual's Signature: _____
(mandatory for individual Sustaining Member credit transfer)

*Please transfer recognition credit to**

Name: _____ TRF Acct No. _____

Address: _____

City, State/Prov., Postal Code: _____

Club and District (if different from above) _____

**Note: Recognition credits cannot be transferred to a club or district.*

Please send recognition materials to: (complete only if recipient is a new PHF or a new Multiple PHF)

Name: _____

Address: _____

City, State/Prov., Postal Code: _____

Country: _____ Telephone: _____

- Please send: Paul Harris Fellow Recognition
- Multiple Paul Harris Fellow pin with: (circle one) 1 2 3 4 5 sapphires (blue stones)
- Multiple Paul Harris Fellow pin with: (circle one) 1 2 3 rubies (red stones)

Guide to Transferring Sustaining Member and Available Credit

To help you to better understand this transfer guide, it may be best if you have your Club's Recognition Summary report in front of you.

There are two types of credit which may be transferred. They are *Sustaining Member* credit (recognition credit that has already been given to an individual) and *Available* credit (recognition credit that is to be given to an individual).

Sustaining Member Credit:

Sustaining Member credits are the amounts less than \$1,000.00 that appear in the *PHF/SM (Paul Harris Fellow/Sustaining Member) Amount* column of the Club Recognition Summary report. **Per the April 1996 Trustee Decision, Sustaining Member credit from former or deceased members can no longer be transferred with the signature of your club president.** Sustaining Member credit can be transferred away from individuals, who do not plan to become Paul Harris Fellows, with their written authorization. The account holder simply needs to sign the reverse side of this form. If the account holder is deceased, Sustaining Member credit cannot be transferred from the account. One can only add to the account. For instance, your club may wish to name an individual a Paul Harris Fellow posthumously.

Available Credit:

Available credit is recognition credit that appears in the *Available for PHF/SM* column of the Club Recognition Summary report. If a donor does not name a Paul Harris Fellow or Sustaining Member (Recipient) at the time a contribution is made, the recognition credits generated from the contribution will be credited to the donor's *Available for PHF/SM* amount. It is important to note that the *available* amount shown on the Club Recognition Summary report for a Paul Harris Fellow is already included in that Paul Harris Fellow's *PHF/SM Amount*, but the *available* amount shown in a Sustaining Member's account is not included in his/her *PHF/SM Amount*.

The Trustee policy allows transfers from an individual's available credit with the signature of the individual. If the individual's signature is unobtainable, the club president or the district governor may authorize the transfer. **However, if a signature is not obtained from the individual from whom available credit is being transferred and that individual wishes to utilize these credits at a later date, the Rotary club or district must reimburse The Rotary Foundation for the full amount that was transferred.**

Available credit also accrues in the club or district contribution account any time the club or district submits a contribution to the Annual Programs Fund, the PolioPlus Fund, PolioPlus Partners, an approved Matching Grant, or the World Fund and does not name a recipient for the recognition credit at the time a contribution is made. Club and District *Available for PHF/SM* amounts can be found under "Club Contributions" on the Club Recognition Summary reports. These amounts may be transferred to individuals with the signature of the club president or district governor.

Transferring Credit:

Sustaining Member credit and *available* credit may be transferred by completing the reverse side of this form and obtaining the appropriate signature. You do not need all three signatures. **Please note that credit may only be transferred to individuals; it cannot be transferred to a club or district account.**

Donor Services Section/RF321
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