

**Yes, I/we have made a commitment to  
The Rotary Foundation in an estate plan.**

Please print the name(s) as you would like the crystal engraved  
and/or for future publication.

- Please check if you *do not* wish to receive an engraved  
crystal.
- Please check if you *would* like a pendant with your pin(s).

Address

City, state or province, country, and postal code

Email

**Optional:**

Rotary ID # Rotary club name

Rotary district

Date(s) of birth

Home, business, and/or mobile phone

**The spending portion of my/our gift to the  
Endowment will be applied:**

- At the Trustees' discretion (World Fund)
- Through SHARE (World Fund and  
District Designated Fund)
- To the Rotary Peace Centers
- To one or more areas of focus:
  - \_\_\_ Peace and conflict prevention/resolution
  - \_\_\_ Disease prevention and treatment
  - \_\_\_ Water and sanitation
  - \_\_\_ Maternal and child health
  - \_\_\_ Basic education and literacy
  - \_\_\_ Economic and community development

**The bequest will be funded by:**

- \_\_\_ Will or living trust
- \_\_\_ Retirement plan beneficiary designation
- \_\_\_ Life insurance beneficiary designation
- \_\_\_ Donor advised fund (U.S.)
- \_\_\_ Charitable remainder trust
- \_\_\_ Other (please describe) \_\_\_\_\_

**The gift to The Rotary Foundation  
is expected to be US\$ \_\_\_\_\_**

(The amount is used for recognition purposes; if no amount is  
selected we will default to Level One.)

Note: \_\_\_\_\_

The recognition materials will be sent to your home address  
unless you provide special instructions in the Note section  
above.

Signature Date

Signature Date

Return this form and any supporting documents you  
wish to share:

**Mail:**

The Rotary Foundation – Planned Giving  
1560 Sherman Avenue  
Evanston, IL 60201-3698  
USA

**Scan and email:** [plannedgiving@rotary.org](mailto:plannedgiving@rotary.org)

**Fax:** +1-847-556-2178



One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
[www.rotary.org](http://www.rotary.org)



**YOUR  
ROTARY  
LEGACY**

Doing Good in the World  
beyond your lifetime

# Rotary's tomorrow depends on what we do today.

You can be an important part of the Foundation's next century of doing good in the world by including a gift to Rotary's Endowment in your estate plan.

Your gift will be carefully stewarded to provide earnings for the programs you know and love, year after year. The Foundation is known for its commitment to effective programs that make a lasting difference in people's lives. A gift from your estate will provide ongoing financial support, just like your annual contributions do today.

Join the many Rotarians and friends who have made a commitment to improving and enriching lives around the globe by leaving a personal legacy with The Rotary Foundation.

## How to include the Foundation in your estate plan

One of the most popular ways to include Rotary in an estate plan is through a will or codicil. Alternatively, you can make Rotary the beneficiary of a retirement plan or insurance policy. Whichever method works best for you, please remember to use the official legal name: The Rotary Foundation of Rotary International.

Here are a few language examples for your estate adviser to consider:

- ◆ For a general gift of a certain percentage or portion of your estate: "I give to The Rotary Foundation of Rotary International one-fourth of my estate."
- ◆ For a gift of a specific asset: "I give 500 shares of XYZ stock to The Rotary Foundation of Rotary International."
- ◆ For a contingent bequest, which takes effect only when certain conditions are met: "In the event my spouse does not survive me, I give to The Rotary Foundation of Rotary International XYZ."
- ◆ For a residual bequest, which directs the disposition of all or a portion of whatever remains after all other required amounts are paid: "I give the rest, residue, and remainder of my estate to The Rotary Foundation of Rotary International."

As always, remember to consult independent tax and legal advisers before making any charitable gift.



## How Rotary programs benefit

Once you have decided to support the Endowment, you can provide further direction on how available earnings are spent. A gift to **Endowment-World Fund** allows the Trustees to direct support where it is most needed around the world. This is the default for gifts that come to the Foundation undesignated. Alternatively, if you select **Endowment-SHARE**, your Rotary district can direct a portion of the spending along with a portion going to the World Fund. This functions like a perpetual annual fund gift. You may also support one or more of the six **areas of focus**. Please let us know your preference by making your selection on the response card.

## Naming your fund

Foundation staff can work with you to personalize your legacy through a named fund within the Endowment. The separately identified fund can 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 \$25,000.

## Let us recognize your generosity

Please let Rotary know when you have completed your estate plan so we may properly thank you.

Rotary is pleased to confer **Benefactor** status on those who commit any amount in their estate plan to the Endowment. Benefactors receive personalized certificates and a special insignia to wear with their Rotary pins.

Those who commit \$10,000 or more receive **Bequest Society membership**, which provides special Foundation updates, invitations to events, an engraved crystal, and an exclusive pin and/or pendant.

## BEQUEST SOCIETY RECOGNITION LEVELS (IN U.S. DOLLARS)

1. \$10,000	6. \$500,000*+
2. \$25,000*	7. \$1,000,000*+
3. \$50,000*	8. \$2,500,000*+
4. \$100,000*	9. \$5,000,000*+
5. \$250,000*+	10. \$10,000,000*+

\*Qualifies for a customized named fund  
+Qualifies for posthumous Arch Klumph Society membership

We may share your name as one of the growing number of Rotarians and friends who are providing future gifts to the Foundation, unless you request anonymity. Rest assured the details and amount of your commitment will remain confidential.