YOUR LEGACY, ROTARY'S PROMISE

The Rotary Foundation

PDG Don Sword, D7815 Endowment Chair

ROTARY INTERNATIONAL

- Founded 1905 by Paul Harris in Chicago
- 1.2M members; 35,000 clubs; 530 districts
- Service Above Self –Club, Community, Vocational, International, Youth
- Not For Profit
- Rotary.org (“My Rotary login for members)

THE ROTARY FOUNDATION

- Founded 1917 by RI Pres. Arch Klumph
- Award Winning Worldwide Charity. (incl. Canadian branch)
- “Doing Good in the World”
- 7 Focus Areas - Peace & Conflict Prevention / Resolution, Disease Prevention & Treatment, Water & Sanitation, Maternal & Child Health, Basic Education & Literacy, Economic & Community Development, Protecting the Environment.
- Signature project is Polio Plus
- my.rotary.org/en/donate

AN IMMEDIATE IMPACT

Annual gifts to your favorite Rotary programs help people live better lives today.

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RECOGNITION

Individual

- Paul Harris Fellow US$1,000+
- Paul Harris Society US$1,000 per yr
- Major Donor US$10,000+
- Arch Klumph Society US$250,000+
- D7815 Polio Plus Soc. US$100 per year

Clubs

- EREY (Every Rotarian Every Year) US$100 per capita giving
- 100% Foundation Giving US$100 average giving
- 100% Paul Harris Society Club

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A LONG-TERM IMPACT

Build a Rotary legacy with planned gifts to the **Endowment.** These support your favorite life-changing programs for the long term.

The Rotary Foundation

Rotary's tomorrow depends on what we do today.

YOUR ROTARY LEGACY

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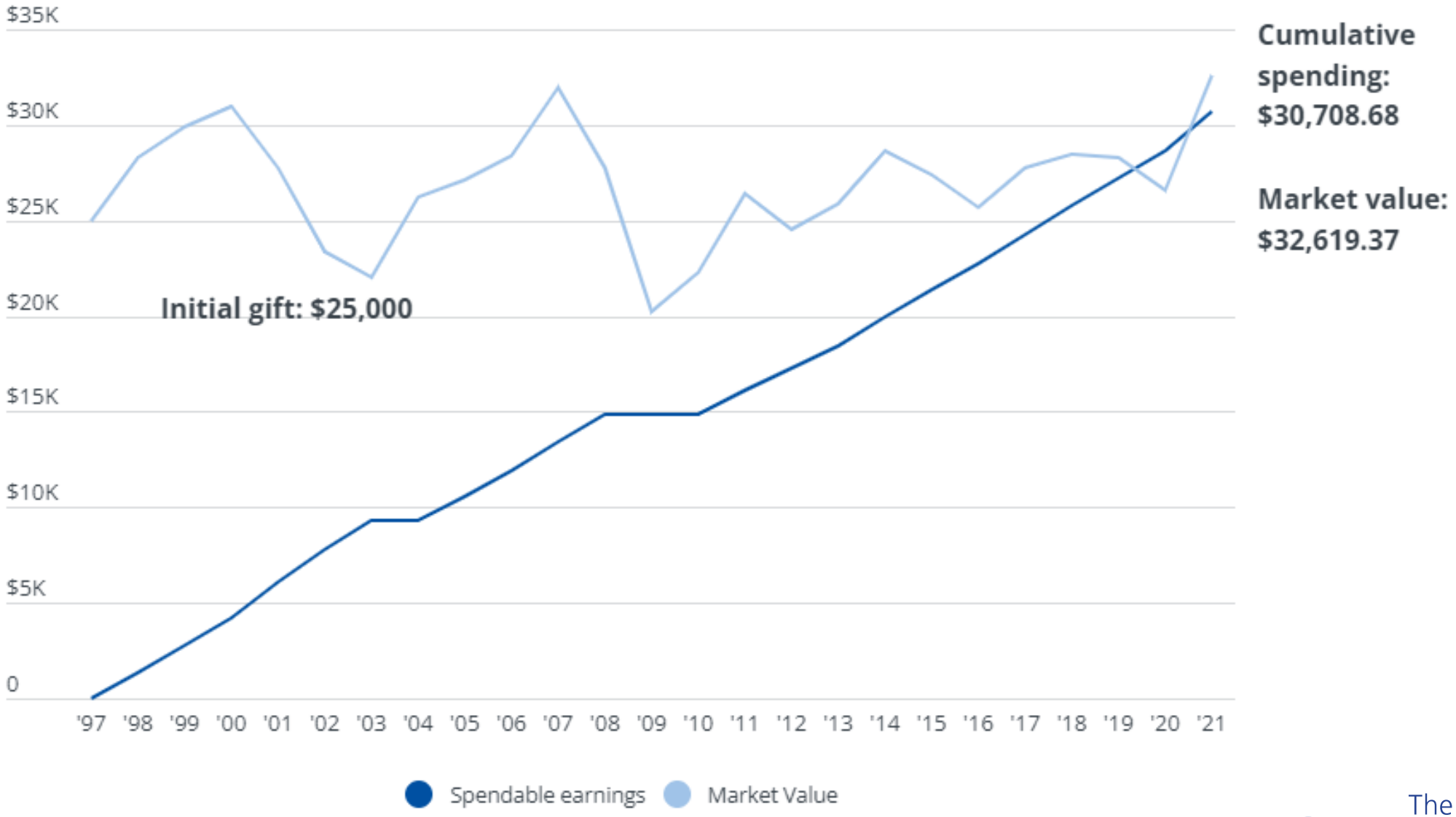

Cumulative spending: $30,708.68

Market value: $32,619.37

The illustration depicts past performance and cannot be relied upon as an indicator of future performance.

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Real Rotarian's Endowment Fund

DATE	Gift Value $	Market value $	Total Spendable Earnings $
2015	30,192	30,466	0
2016	33,870	34,002	0
2017	33,870	37,994	554
2018	33,870	39,852	1,300
2019	33,870	40,012	1,663
2020	33,870	38,105	1,369
2021	33,870	47,696	1,790
2022	33,870	41,116	2,153
2023	33,870	40,950	1,897
TOTAL			$10,726

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NOW

A gift to the Endowment Fund made during your lifetime that allows you to see your legacy in action

LATER

A documented promise of a gift that makes an impact on the future, not on your finances

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WORLD FUND

General support wherever the need is greatest

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SHARE

Split evenly between World Fund & District Designated Funds

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MAKING A BEQUEST

This method of transferring assets is usually documented in a will or estate plan.

NAMING THE ROTARY FOUNDATION AS BENEFICIARY

This can be used for:

- Certain life insurance policies
- Retirement assets
- Bank or investment accounts

The correct name in Canada is:

“**The Rotary Foundation Canada**”

/we have made a commitment to
otary Foundation Endowment.

appear on recognition materials and/or for future

vince, country, and postal code

Rotary club name

bile phone

on of the gift shall be:
und)

and District Designated Fund)

focus:
t prevention/resolution
n and treatment
on
health
literacy
unity development

e number above to
nces.

The bequest will be funded by (some gift options are not available in all regions):

- ___ Will or living trust
- ___ Retirement plan beneficiary designation
- ___ Life insurance beneficiary designation
- ___ Donor advised fund
- ___ Charitable remainder trust
- ___ Other (please describe) _____

The gift to The Rotary Foundation is expected to be:

US$ _____

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

Recognition options:

For those who commit $10,000 or more, an engraved recognition crystal and one recognition pin per person will be automatically shipped to a home address.

My/our recognition preferences are noted below:

- ☐ I/we *do not* wish to receive an engraved crystal.
- ☐ I/we *would* like a pendant with the pin(s).
- ☐ Tell me more about special naming opportunities.
- ☐ Send all recognition materials to this address instead:

☐ I/we have another request. (Please describe)

Signature Date

Signature Date

Please return this form and any supporting documents you wish to share that name Rotary as beneficiary. Contact information for your nearest Rotary office is featured on the back cover.

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RECOGNITION

Immediate gifts

- Benefactor US$1,000+
- Major Donor US$10,000+
- Arch Klumph Society US$250,000+

Planned gifts

- Benefactor US$1,000+
- Bequest Society US$10,000+
- Legacy Society US$1 million+

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RECOGNITION

Rotary’s Promise Club

You can inspire others and find opportunities to be distinguished as a Rotary’s Promise Club.

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BUILD A CULTURE OF PHILANTHROPY

At home and in your community

The Rotary Foundation

YOUR LEGACY, ROTARY'S PROMISE

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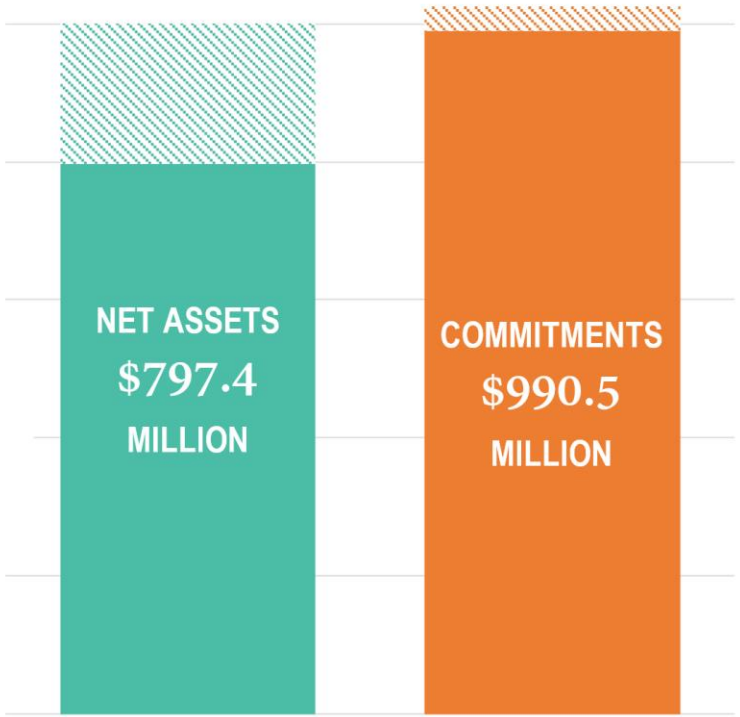
PROGRESS TOWARD GOAL

Building
The Rotary Foundation
ENDOWMENT
2025 by 2025

COMBINED TOTAL= **$1.788 billion**

Remainder to goal= $237 million

Goal $1 billion + $1.025 billion = $2.025 billion



- *Unaudited* -

Net Assets and Commitments as of 31 August 2024

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D7815 MAGICAL MAJOR GIFTS CAMPAIGN

COUNT ME IN NOW – COUNT ME IN LATER

- **Major Gifts - US$10,000 & up.**
- **Now - donate cash now**
- **Later - pledged over 3 years, or a future gift by will, codicil, life insurance, etc.**
- **Or Major Donor level by 6/30/2025**
- **Can direct gift to your chosen Rotary Foundation area:**
  - **Annual Fund**
  - **Polio Plus.**
  - **Seven areas of focus.**
  - **World Fund**
  - **Endowment Fund**
- **Anyone can give!**

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ROTARY.ORG/LEGACY

The Rotary Foundation Planned Giving Team

plannedgiving@rotary.org

+1-847-866-3100

Bequest form: rotary.org/yourlegacy

- **Carolyn Ferguson**
- Senior Major Gifts Officer-Zone 28 | Canada & parts of USA-WA, NY, MI, ME
- The Rotary Foundation | Locally Based in Ontario, Canada (ET)
- Primary 1.289.239.7190
- Carolyn.ferguson@rotary.org

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PDG Don Sword
District Endowment / Major Gift Chair (DEMC)
Rotary District 7815
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