

**Yes, I/we have made a commitment to  
The Rotary Foundation Endowment.**

Name(s) to appear on recognition materials and/or for future publication.

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 the gift shall be:**

- Unrestricted (World Fund)
  - Directed to:
    - SHARE (World Fund and District Designated Fund)
    - Rotary Peace Centers
    - 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
- Please contact me at the phone number above to discuss gift designation preferences.

**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.

[rotary.org/legacy](http://rotary.org/legacy)

**World Headquarters**

Rotary International  
One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
Tel. +1-847-866-3100  
Email: [planned.giving@rotary.org](mailto:planned.giving@rotary.org)

**Brazil Office**

Rotary International  
Rua Tagipuru 209  
01156-000 São Paulo, SP, Brazil  
Tel. +55-11-3217-2630  
Email: [fr.brasil@rotary.org](mailto:fr.brasil@rotary.org)

**Europe/Africa Office**

Rotary International  
Witikonstrasse 15  
CH-8032 Zurich, Switzerland  
Tel. +41-44-387-71-11  
Email: [eao@rotary.org](mailto:eao@rotary.org)

**Japan Office**

Rotary International  
Mita Kokusai Building 24F  
Mita 1 Chome 4-28  
Minato-ku, Tokyo 108-0073  
Japan  
Tel. +81-3-5439-5800  
Email: [rijpntrf@rotary.org](mailto:rijpntrf@rotary.org)

**Korea Office**

Rotary International  
Rm. 705, 70, Gukjegeumyung-ro  
Yeongdeungpo-gu, Seoul 07333  
Korea  
Tel. +82-2-783-3077  
Email: [rikorea@rotary.org](mailto:rikorea@rotary.org)

**South Asia Office**

Rotary International  
Thapar House  
2nd Floor, Central Wing  
124 Janpath  
New Delhi 110 001, India  
Tel. +91-11-42250101  
Email: [risao@rotary.org](mailto:risao@rotary.org)

**South Pacific and  
Philippines Office**

Rotary International  
P.O. Box 1415  
Parramatta, NSW 2124  
Tel. +61-2-8894-9800  
Email: [risppo@rotary.org](mailto:risppo@rotary.org)



330-EN—(1017)

The  
**Rotary**  
Foundation



**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 serving humanity by including a gift to Rotary's Endowment in your estate plan.

Your gift will be carefully stewarded to provide funding 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 as your annual contributions do today.

Join the many Rotarians and friends who have made commitments to improving and enriching lives around the globe by creating your personal legacy with The Rotary Foundation.

## How to include Rotary in your estate plan

One of the most popular ways to include Rotary in an estate plan is through a will or codicil. Whichever method works best for you, please remember to use the official legal name, **The Rotary Foundation of Rotary International**, unless one of the following names applies in the region where you live:

- The Rotary Foundation (Canada)
- Rotary Foundation (India)
- Public Interest Incorporated Foundation — Rotary Foundation Japan
- Rotary Foundation of the United Kingdom

Here are a few examples for your 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 [name] 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 the remainder of my estate."
- ◆ 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."

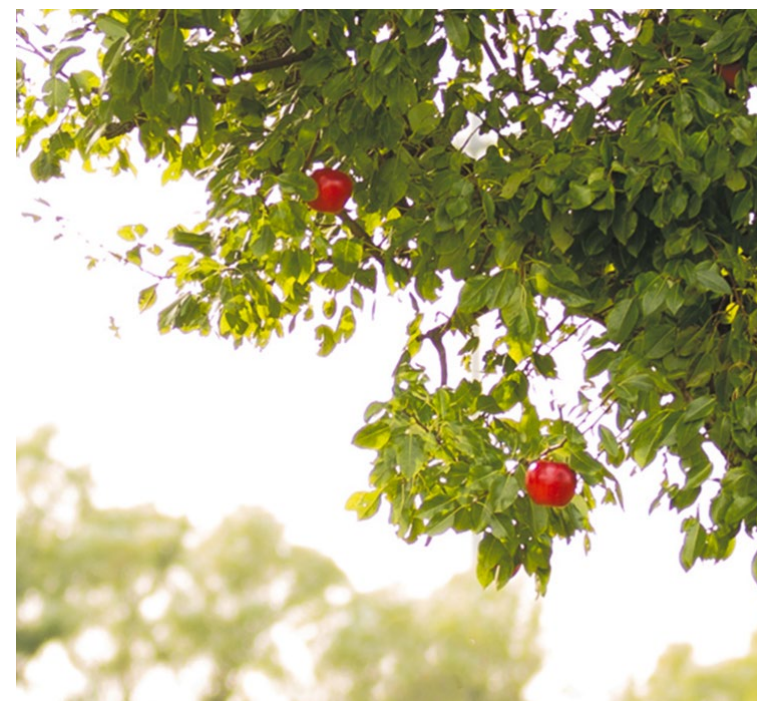
As always, remember to consult independent tax and legal advisers before making any charitable gift.

## How your legacy carries on

Once you have decided to support Rotary's Endowment, you can provide 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. A gift to **Endowment-SHARE** allows your Rotary district to direct a portion of the spending along with a portion going to World Fund. This functions as a perpetual Annual Fund gift. You may also support one or more of the **areas of focus**. Current trustee policy is to direct undesignated gifts of \$10,000 or more to World Fund.

## Personalizing 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 Rotary recognize your generosity

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

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.

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 always remain confidential.

Once you have included Rotary in your estate plans, please complete this form and mail it to your closest Rotary office or submit notification of your gift at [rotary.org/legacy](https://rotary.org/legacy) so that we may properly thank you and recognize your generosity.