



# THE ROTARY FOUNDATION DONOR ADVISED FUND

## THIRD PARTY CONTRIBUTION FORM

Use this form for all contributions by check to The Rotary Foundation Donor Advised Fund.

Rotary of Fairbanks DAF  
DAF ACCOUNT

540  
ACCOUNT NO.

Please do not send money orders or cashier's checks. The minimum contribution amount is \$1,000; checks from multiple donors may be combined to meet this requirement. All contributions of more than \$250 will receive an individual confirmation letter, suitable as a receipt for income tax purposes. Please complete the Donor Information section for **all donations over \$250**. Thank you for your support.

### DONOR INFORMATION

Please print. Other than your name, any information that is printed on your check does not need to be included here.

MR./MRS./MS./DR./OTHER	NAME			
ADDRESS	CITY	STATE	POSTAL CODE	
TELEPHONE	ROTARY CLUB			

Enclosed is a contribution in the amount of \_\_\_\_\_. This check, made payable to The Rotary Foundation Donor Advised Fund, represents my gift to the Donor Advised Fund account listed above. I understand that:

- My contribution is irrevocable
- I do not have any grant or investment allocation recommendation privileges
- I will not receive Foundation donor recognition of any kind.

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

PRINTED NAME \_\_\_\_\_

**FOR ASSISTANCE, PLEASE CONTACT:** The Rotary Foundation Donor Advised Fund | 847-866-3359 | [plannedgiving@rotary.org](mailto:plannedgiving@rotary.org)

### RETURN THIS COMPLETED FORM TO:

Rotary DAF c/o NRS  
12 Gill Street, Suite 2600  
Woburn, MA 01801

RotaryDAF@nrstpa.com  
Fax: 781-658-2497

## WAYS TO CONTRIBUTE

Please note that all contributions:

- Are irrevocable
- Must be made in U.S. dollars
- Cannot be made by money order or cashier's check

In addition, contributions equal to or greater than \$250, whether from an individual or a corporation, will be issued a U.S. charitable tax receipt. For contributions of less than \$250, the IRS will accept a copy of a canceled check as a charitable receipt.

You can contribute to the Donor Advised Fund through your online account or by following the instructions below.

### CHECK

**Payable to:** The Rotary Foundation DAF

**On the Memo line:** Account name and number

**Mail to:** Rotary DAF c/o NRS, 12 Gill Street, Suite 2600, Woburn, MA 01801

*Rotary of Fairbanks DAF, Account #540*

Significant delays will occur if not mailed to Woburn, MA.

### CREDIT CARD/ONLINE CONTRIBUTIONS

If you are an account advisor, you may make a credit card contribution through your online account. Go to [rotary.org/daf](https://rotary.org/daf) and click on "Make a Gift" under "Contributions."

If you are not an account advisor, you may still contribute online at <https://www.yourfundaccount.com/rotary/HowToContribute.asp>.

### WIRE INSTRUCTIONS

In addition to authorizing the wire, you must fax a copy of the wire authorization to 781-658-2497 to complete the transfer.

<b>ABA NUMBER:</b>	011001234/Bank of New York
<b>ACCOUNT NUMBER:</b>	0000108138
<b>ACCOUNT NAME:</b>	General
<b>BENEFICIARY ACCOUNT:</b>	10017961000
<b>REFERENCE ACCOUNT NAME:</b>	ROTARY FOUNDATION DAF-CASH

### STOCK INSTRUCTIONS

In addition to authorizing the trade, you must fax a copy of the trade instructions to 781-658-2497 to complete the transfer.

<b>DTC PARTICIPANT ID:</b>	0443
<b>DTC SHARES TO:</b>	Pershing, LLC
<b>FOR CREDIT TO ACCOUNT:</b>	N7M002234
<b>CLIENT ACCOUNT NAME:</b>	The Rotary Foundation of Rotary International

- See the Donor Advised Fund Program Circular on how Foundation recognition, if any, is awarded for DAF contributions and grants.
- For more information about how Donor Advised Funds operate, please visit [rotary.org/daf](https://rotary.org/daf).
- Non-U.S. contributions may require additional information to meet U.S. guidelines for international fund transfers.

### Ways to Contribute to the Donor Advised Fund

You can contribute to the Donor Advised Fund through your online account or by following the instructions below

#### Check

Payable to: The Rotary Foundation DAF  
 In the Memo line: ~~DAF Account Name~~ *Rotary of Fairbanks DAF*  
 Mail to: Rotary DAF *account # 540*  
 c/o NRS  
 12 Gill Street  
 Suite 2600  
 Woburn, MA 01801

#### Credit Card

The Rotary Foundation Donor Advised Fund accepts credit card donations via PayPal. You do not need a PayPal account to make a credit card donation. To make a donation simply click the DONATE button. This takes you directly to PayPal. When you donate with a credit card, your card number, and all other required information, is entered on a secure, encrypted web page at PayPal.com. If you have a PayPal account, then you will be able to log in directly to your PayPal after clicking the Donate button below.

Visa, MasterCard, American Express and Discover are accepted.

What is the specific name of the The Rotary Foundation Donor Advised Fund Account?

What is the account number of The Rotary Foundation Donor Advised Fund Account?

**\*PLEASE CHECK OFF THE BOX THAT SENDS YOUR ADDRESS TO ROTARY INTERNATIONAL, NEEDED FOR TAX RECEIPT**

This information will enable us to process your donation in a timely manner. Please obtain at least the Donor Advised Fund Account name prior to submitting your donation.

For questions concerning the account name or number you will donate to, please contact The Rotary Foundation Planned Giving team at (847) 866-3359 or [planned.giving@rotary.org](mailto:planned.giving@rotary.org).

Donate



#### Stock and Wire Transfers

If you wish to contribute a gift of stock or via wire transfer, please contact The Rotary Foundation Planned Giving team at (847) 866-3359 or [planned.giving@rotary.org](mailto:planned.giving@rotary.org).

Please note:

- All contributions are irrevocable.
- All contributions from individuals and corporations, will be issued a U.S. charitable tax receipt.
- All contributions must be made in U.S. dollars and cannot be by money order or cashier's check.
- For more information about how Donor Advised Funds operate, please visit <https://rotary.planmygift.org/donor-advised-funds>
- Non-U.S. contributions may be subject to additional information to meet U.S. guidelines for international fund transfers.