

# West Omaha Rotary Foundation Planned Giving Program



## West Omaha Rotary Foundation PLANNED GIVING PROGRAM

**Mission:** The West Omaha Rotary Foundation provides financial assistance to support Rotary Club of Omaha – West administration, event underwriting and grants to Rotary Club of Omaha - West sponsored programs. The foundation has an annual goal of spending five percent (5%) of its endowment and in addition, a significant percentage of any revenue generated each year. Current spending approximates \$50,000 per year. **Examples of many of the recent expenditures include:**

1. Skinner Book Project to honor speakers at our programs
2. High School Senior Recognition Luncheon underwriting and donating to charities in their honor
3. Adopt a school partner, Skinner Magnet Center, Skyhawk Luncheon underwriting and awards
4. Matching contribution to the Mitten Tree Project, a program that provides gloves, hats, and other warm clothing to Skinner Magnet Center students
5. Ollie Webb Center Grant for annual play
6. Police & Fireman's Award Luncheon underwriting
7. Food Packaging Grant
8. Pitch Competition Grant for minority owned businesses

### Examples of Ways to Give (Future)

1. Inclusion of West Omaha Rotary Foundation in a will (or codicil) or trust
2. Naming West Omaha Rotary Foundation as a beneficiary of a life insurance policy or trust.
3. Separate Gift Agreement with West Omaha Rotary Foundation (planned gift, major gift, gift annuity, charitable remainder trust)

### Examples of Ways to Give (Now)

Current gift of cash, stock, bonds, land, property, jewelry, etc. to West Omaha Rotary Foundation.

### Legal Assistance Referral

The West Omaha Rotary Foundation will gladly provide list of attorneys that specialize in estate planning to assist donors.

### West Omaha Rotary Foundation Society Membership

Participant Membership shall be exclusive to those members who are willing to give in addition to any other giving directly or indirectly (i.e., sponsorship of event benefitting West Omaha Rotary Foundation) to the West Omaha Rotary Foundation in the future.

#### Participant Levels

##### **Founders Membership:**

Donors pledging consideration of \$10,000 or more will be inducted into the Society to honor Donor and other past and present members that have contributed significant time, treasure, and talent to the West Omaha Rotary Foundation.

##### **Presidents Membership:**

Donors pledging consideration of \$5,000 or more will be inducted into the Society to honor Donor and all past presidents of Rotary Club of Omaha - West.

##### **General Membership:**

Donors pledging consideration of \$1,000 or more will be inducted into the Society to honor Donor and all past and present members of Rotary Club of Omaha - West.

Rotary  
Club of Omaha - West



For More Information, Please Contact:

Richard Secor, Jr.  
Member, Board of Trustees, West Omaha Rotary Foundation  
W/402.548.4010  
M/402.616.5022  
richard.secor@lundco.com