

**November = The Rotary Foundation (TRF) Month
SHARE FOREVER CAMPAIGN to Benefit District 7780
Tony Wagner, Nov. 13, 2024**

Nicole and I are one of 21 ambassadors in the District, and we have been “coached” to deliver this message, with support from the District and our Zone Major Gift Coordinator - Celeste Herbert. This work is new to us, and we are feeling our way along the process.

The Rotary Endowment provides:

A reliable LONG TERM income stream to support Foundation and District projects and grants. It complements TRF’s Annual Giving Share Program, where 50% of the gain from those contributions are returned to the District 3 years after being invested. The other 50% is allocated via TRF grants. The Endowment takes commitments or donations of \$1000 or more (BENEFACTOR) or higher amounts (Bequest Society) and invests the funds *when received* at a return of 8 – 9 %/year. The INCOME generated each year from those funds are used to fund similar programs. In ShareForever, 50% of the income is returned to the District.

At higher amounts funds can be directed to one of over 10 Rotary Areas of Focus.

For example, a \$10,000 contribution may yield \$800-900/ year of income forever. In the shared bucket the District receives \$400 - \$450/year.

The District started a campaign last Rotary year to raise \$1MM to match a \$1MM fund set up by a District Rotarian Brenda and her husband Dick Cressey . By Feb 20, we raised \$400K of the match.

By Mid year we raised/identified \$3.4MM far above the \$2MM goal.

By soliciting Rotarians on an individual basis, we found money had already been allocated to the Foundation in wills and trusts, but the Foundation was never notified. That happened in our own Club with several members.

The District decided to set a new goal at \$5MM by the end of February 2025. Rotarian and Past DG Marion Cheney and her husband offered \$250,00 for a second match to get this campaign off and running. We started with about

\$3.65 MM and need to identify another \$1.35MM. These numbers support Rotary's Endowment goal of \$2.025B by the end of 2025. The value end of year 2023 was \$1.63B, and is now about \$1.850 B, with \$175 MM to go. The amount endowed generated \$25MM in income at 8.1% in 2023. \$678MM Net assets, \$948MM Commitments Year ending 2023. 2021 was 31%, and the average for the last 10 years 6.6%. A larger value partially supports a higher return.

Nicole, Nancy Hawes and I attended a kick-off meeting early this year and we came away very impressed with the SERVICE AND HELP the Foundation can provide to:

- 1. Make it easier for an individual to set up a lasting gift and be a smarter philanthropist.**
- 2. Provide extremely flexible ways to set up a gift, perhaps more than any other Foundation**
- 3. Provide professional financial and legal advice if necessary. The Foundation Endowment is fully staffed locally and in Evanston to provide information and guidelines.**
- 4. Leave a permanent individual and family long term legacy donation.**
- 5. Help you share your future donation information now with the Foundation.**
- 6. List TRF Share Account now without naming a specific area, and it can be changed later on without affecting a will.**

The District Endowment Team is more interested in providing an opportunity for many more to participate and benefit from this program than in pressing people for certain levels of donation or any donations now. This is a low pressure approach to OFFER A ROTARY OPTION to your legacy planning, with extensive options and confidential support from a trusted organization.

Most bequests go towards the general Share Account at 72% of new funds in the past Rotary year. At any commitment level, others to consider: Peace Centers. Peacebuilding and Conflict Prevention, Disease prevention, Water Sanitation Hygiene, Maternal and Child Health, Basic Education and Literacy, Community Eco development, Environment.

You can become a Benefactor via an outright gift of \$1000 or a future commitment to send that amount to the Endowment. You can add periodically, as one Club member already has done. At the \$10K level you become part of the Bequest Society and you can designate where you want the funds to go, and at various Levels above \$25,000 you can name your Fund, in addition to focusing on an area of interest.

Remember, participation at any level is something to consider, and most importantly the process is made easy and effective for you and your family by support from the Foundation specialists. Their work is done on a low key and very confidential basis. Please consider this at any level you can. Nicole and I would prefer you reach out with questions to open a dialogue about what might WORK FOR YOU!

January 27th Fireside Chat in Portland with Celeste Herbert, Major Gifts Officer for our Zone and District. Notice to go out during after Christmas

FMI Shareforever@rotary7780.org

Note: For example Rotary Polio goal in 1988 was \$120MM, and we raised \$240MM

Point being many folks worldwide support the work we do and offer as best they can to achieve our charitable goals.