



Rotarians join community members in the Guatemalan Highlands to celebrate the completion of a pedestrian bridge.

CHOOSE THE GIFT PLAN

that Matches Your Goal Now or in Your Estate Plan

WHY CONTRIBUTE

to the RCM Community Trust

- **The connection of people and resources** is required for the club to undertake significant projects and maintain its reputation as an organization of leaders making a difference.
- Funds designated for international efforts can match funds from Rotary International, allowing for **bigger, better and bolder projects.**
- Designated gifts or named funds such as those for scholarships or international projects **can have a lasting impact** in exactly the way the donor would like.
- The trust is a permanent fund. Contributions made today will continue to **have an impact for years to come.**
- **The funds within the RCM Community Trust are professionally managed,** and oversight is provided by a trustee who is an officer of the club, an investment advisory committee, and the RCM Board of Directors.

YOUR GIFT	YOUR GOAL	HOW YOU MAKE THE GIFT	YOUR BENEFITS
Gift in Your Will/Trust	Defer a gift until after your lifetime.	Name the Rotary Club of Milwaukee in your will or living trust (designate a specific amount, a percentage or a share of the residue).	<ul style="list-style-type: none"> • Gift exempt from federal estate tax • Control of asset for your lifetime
Outright Gift of Cash	Make a quick and easy gift.	Simply write a check.	<ul style="list-style-type: none"> • Immediate income tax deduction • Witness the benefits of your generosity
Outright Gift of Securities	Eliminate tax on capital gains.	Contribute long-term appreciated stock or other securities.	<ul style="list-style-type: none"> • Immediate charitable deduction of full fair market value • Elimination of capital gains tax
Gift of Life Insurance	Make a large gift with little cost to yourself.	Contribute a life insurance policy you no longer need.	<ul style="list-style-type: none"> • Current income tax deduction • Possible future deductions through gifts to pay policy premiums
Gift of Retirement Assets	Eliminate the twofold taxation on IRAs or other qualified retirement plans.	Name the Rotary Club as the beneficiary of all or a portion of your retirement assets using the plan's beneficiary form.	<ul style="list-style-type: none"> • Make the gift from the most highly taxed assets, leaving more for family • Eliminates income and estate taxes
Charitable Remainder Trust	Create a hedge against inflation over the long term and supplement your retirement income.	Create a trust that pays either a fixed amount or a fixed percentage of trust assets annually.	<ul style="list-style-type: none"> • Income stream for life or term of years • Immediate income charitable tax deduction
Charitable Lead Trust	Reduce gift and estate taxes on assets you pass to children or grandchildren.	Create a charitable trust that pays fixed or variable income to us for a specific term of years; thereafter the balance is given to loved ones.	<ul style="list-style-type: none"> • Reduces your taxable estate • Property kept by your family, often with reduced gift taxes

if not RCM, then

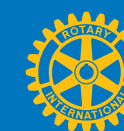
WHO?

Please contact us for more information on how you can contribute to the **RCM Community Trust.**

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Rotary
Club of Milwaukee