

HOW WILL YOU CHANGE THE WORLD?

Gifts to Rotary's Endowment are invested and professionally managed to provide an ongoing stream of financial support that will help future Rotarians improve health, support education, and alleviate poverty.

Here are some easy ways to start building your Rotary legacy today.

PROVIDE FOR A BEQUEST IN YOUR WILL OR OTHER ESTATE PLAN

You may choose to include a gift of a specific dollar amount, a percentage of what is left after providing for relatives, or even a particular asset. If you already have a will, you may add a bequest through a simple codicil or amendment naming The Allentown Rotary Club Foundation.

MAKE ROTARY THE BENEFICIARY OF A RETIREMENT PLAN

Simplify matters for your loved ones by directing all or a portion of what remains in your retirement accounts to charity and leaving more tax-favored assets to your heirs. You may designate The Allentown Rotary Club Foundation as beneficiary of your IRA without changing your will.

TURN UNNEEDED LIFE INSURANCE INTO A LASTING LEGACY

You can make The Allentown Rotary Club Foundation the beneficiary of life insurance policies without changing your will or other estate plans. These policies can often be a good choice to fund charitable gifts as your financial and family circumstances change over the years.

SEE YOUR GIFT IN ACTION WITH A PLEDGE

Secure your future Rotary legacy by pledging \$25,000 or more in outright gifts over a three-year period or give \$10,000 now and make a commitment for \$15,000 in your estate plan to establish your named fund.

First Codicil To The
Last Will and Testament of
(name) _____

I, (NAME & ADDRESS), County of Lehigh, Pennsylvania, being of sound and disposing mind, memory and understanding, declare this to be the First (or other number) Codicil to my Will dated _____, 2018.

I hereby add Paragraph _____ # _____ to my Will dated _____ 2018, to provide as follows:

(PARAGRAPH #): I give and bequeath the sum of _____ Thousand Dollars to The Allentown Rotary Club Foundation, the charitable foundation governed by the Rotary Club of Allentown, PA.

In all other respects I do hereby ratify and confirm my will dated _____, 2018.

Signature of Testator/Testatrix
DATE: _____

of _____

Witness

of _____

Witness

of _____

Witness

COMMONWEALTH OF PENNSYLVANIA)

) SS

COUNTY OF _____)

I, _____, the Testator/Testatrix, having been duly qualified according to law, acknowledge that I signed the foregoing instrument as the First Codicil to my Will dated _____, and that I signed same as my free and voluntary act for the purposes therein expressed.

Testator/Testatrix

We, _____, _____ and _____, having been duly qualified according to law, depose and say that we were present and saw _____ Name _____, the Testator/Testatrix, sign the foregoing instrument as the First Codicil to his/her Will dated _____; that he/she signed it as his/ her free and voluntary act for the purposes therein expressed; that each of us in his/her sight and hearing and at his/her request signed the Codicil as witnesses; and that to the best of our knowledge he/she was at that time eighteen (18) or more years of age, of sound mind and under no constraint or undue influence.

Witness

Witness

Witness

Subscribed, sworn to or affirmed, and acknowledged before me by the above-named Testator/Testatrix and by the witnesses whose names appear above on this _____ day of _____, 2_____.

Notary Public
My Commission Expires:

FROM PLAN OWNER TO IRA ADMINISTRATOR

Date _____

IRA Plan Administrator Name _____

Address

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # _____ pursuant to Sec. 408(d)(8) of the Internal Revenue Code Of 1986, as amended. I am 70 1/2 years old or older.

Please issue my check in the amount of \$ _____, payable to:

The Allentown Rotary Club Foundation (FEIN 23-7046405)

And mail it as soon as possible, but to arrive no later than December 31, 20__ to:

Allentown Rotary Foundation
c/o Barbara W. Bigelow
229 N. 27th Street
Allentown, PA 18104-5335

In your communication to **The Allentown Rotary Club Foundation** please include my name and address as listed below as the donor of record in connection with this transfer. Please copy me on your transmittal. If you have questions please contact me at telephone # _____ .

Thank you for your assistance in this matter.

Sincerely,

_____ signature

_____ printed name

_____ address

Correspondence from Donor to the Allentown Rotary Club Foundation

Date _____

To: Name & address of Foundation Treasurer

Dear Mr./Ms. :

It is my pleasure to inform you that I have requested a qualified charitable distribution from my Individual Retirement Account payable to the Allentown Rotary Club Foundation in the amount of \$ _____ from my plan trustee/administrator,

Name of plan trustee or administrator

It is my intent to comply with Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended, in connection with this gift. Accordingly, upon your receipt of payment from my trustee/administrator, please send me a written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by your organization in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization, nor will it fund a life income agreement.

Sincerely,

Printed donor name

Signature

Address & other contact information