



## The Jerry Johnson Testamentary Trust Match Program

District 5870 has a unique method to help you become an initial (first-time) Paul Harris Fellow. Over the past six years, 1,207 Rotarians in 76 different clubs have taken advantage of this program, resulting in 619 PHFs. We hope to be able to help you, too.

The Jerry Johnson Testamentary Trust (the "Trust") will generally match contributions of new cash made during the current Rotary year to the Annual Fund-SHARE on a 1-to-1 basis in amounts of \$100 to \$500 for any active Rotarian in District 5870 who is not yet a first time Paul Harris Fellow.

Here's how it works:

1. Before making an eligible contribution, please contact me via email at [richkaye@hot.rr.com](mailto:richkaye@hot.rr.com) and let me know how much you intend to contribute. The Trust will establish your baseline and monitor Rotary Foundation (TRF) reports to (1) verify that the funds have been received and posted properly to TRF records, and (2) determine the amount of the match for which you qualify.
2. Send your contribution directly to TRF using either The Rotary Foundation Contribution Form (123-EN) or going on-line at [www.rotary.org/give](http://www.rotary.org/give). *Please note: If you are going to donate on-line, be sure to sign into My Rotary before doing so.* Once the contribution appears on your record, the Trust will submit the match.
3. It is not necessary to make a contribution that, when matched by the Trust, will result in a PHF in order to take advantage of the program. For instance, if you have already contributed \$500 to date, and now elect to contribute just \$100 more, the Trust will match that \$100.
4. There are a few exceptions. Please note that the Trust:
  - a. Will not match contributions less than \$100, and will not match more than it actually takes to achieve the PHF. For instance, if you have already contributed \$500 to date, and now elect to contribute \$300 more, the Trust will only match the first \$200 so that you achieve PHF status. Because of this, if you already have contributed more than \$800 toward your first PHF you are generally not eligible for the match.
  - b. Will not match contributions made to PolioPlus, Endowment Fund, Rotary Peace Centers, and Global Grants. While these contributions are both appreciated and important, they fall outside the parameters of the Trust.
  - c. Will not match Foundation Recognition Point transfers.
5. If applicable, please provide me with the mailing address to which your PHF certificate and pin can be mailed by TRF.

Yours in Rotary Service,

PDG Rich Kaye

Operating Trustee, Jerry Johnson Testamentary Trust Donor Advised Fund

Revised August 31, 2017