

Leave a Legacy Planned Giving Program

Rancho Bernardo
Rotary
Club Foundation



Planned giving is the act of making a commitment to give a charitable organization a major gift, over time or at death, as part of the donor's overall financial and estate planning

- Discussions with your financial advisor and lawyer can guide you on the type of gift that is most appropriate:
 - Support the Foundation with gifts that don't impact the way you live by leaving estate assets in the future or by making immediate gifts of those assets that are "out of sight and out of mind"
 - Set up life income gifts. These gifts that pay you back help you make a substantial gift to the Foundation while increasing your income
 - Choose gifts that help you meet your personal planning goals, save on taxes and make a gift to the Foundation at the same time

***See our Planned Giving document at
rbrotary.org for details and to sign up***

Blue and Gold Society

The Blue and Gold Society is a faithful group of individuals and couples who have expressed their commitment to the mission of the Foundation by remembering us in their will, trust or estate plan. If you remember us with a gift we will provide you with a certificate and appropriate keepsake identifying you as a Blue and Gold Society member. See document for details

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