

GROWING YOUR ROTARY LEGACY: ESTABLISHING A FUND IN YOUR NAME

Creating an endowment is a significant and impactful way to support your favorite Rotary causes long-term. Here's a checklist to help you understand the steps and resources needed, tailored specifically for those who wish to establish a personal endowment fund that supports The Rotary Foundation in perpetuity.

Endowment Fund Creation Checklist

Consult Your Major Gifts Officer

Schedule an initial conversation with Rotary's professional staff in order to best align your philanthropic goals with Rotary's programs, granting mechanisms (global grants, scholarships, etc.) and funding opportunities.

Determine Your Fund's Purpose

If you wish to focus your fund, choose which of Rotary's seven areas of focus best aligns with your values and interest for perpetual impact.

Review Funding Amounts & Pathways

While the minimum to establish an endowed fund is \$25,000, larger gifts can allow for customized allocation of the fund's earnings. Your ultimate gift size - within or beyond your lifetime - may be determined by your options to give via:

- Single Major Gift/Lump Sum
- Three-Year Pledge
- Deferred Gift from Estate Assets

Consult Your Advisor(s) to Assess Finances & Timeline

Your personal financial circumstances will determine the timing and structure of your gift. You will want to consult your tax and financial advisors to explore optimal gift amounts, timing, and the most tax-advantageous assets to contribute (i.e., cash, securities, real estate, retirement assets, bequest arrangement, Donor Advised Fund, etc.).



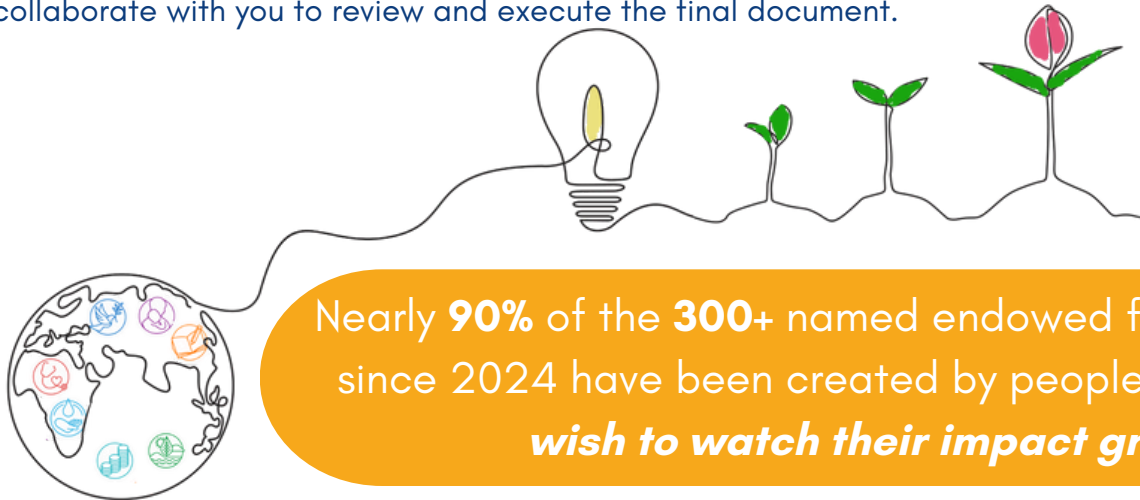
Major Gifts Officer Rachel Greenhoe (+1 (847) 866-3476 or Rachel.Greenhoe@Rotary.org) is based in your region and is available to help via phone consults, virtual meetings and/or in-person engagements.

□ **Decide Your Recognition Preferences**

Establishing a fund in your name or in the name of a loved one can be a visible legacy of your life of Rotary service. Generations of Rotarians will know that your thoughtful support made their service possible. Public recognition – such as Major Donor, Bequest Society, Arch Klumph Society or Legacy Society status – will depend on the size and structure of your gift. Anonymity is always an option.

□ **Finalize Your Gift Agreement**

Your Major Gifts Officer will present to you a draft Gift Agreement to document your intentions, outline your fund's name and purpose, and clarify any preferences for anonymity. We will collaborate with you to review and execute the final document.



Nearly **90%** of the **300+** named endowed funds activated since 2024 have been created by people like you who **wish to watch their impact grow.**

□ **Complete the Gift Transfer**

Arrange for the transfer of your chosen assets to The Rotary Foundation of Rotary International (Tax ID: 36-3245072). Your Major Gift Officer can provide you with forms that can help streamline the process based on your advisors' guidance of your best assets to gift in establishing your fund.

□ **Receive Appreciation and Acknowledgement**

Along with thanks from your Major Gift Officer and others, you will receive written confirmation that your endowed fund has been established, as well as formal acknowledgements and/or tax receipts when appropriate. Your club and district may also wish to publicly celebrate your generosity; in determining your comfort level with this, consider how your journey of giving may inspire others.

□ **Stay Engaged and Updated**

The impacts of your endowment are likely to be discussed at Rotary meetings and donor gatherings, so you'll want to continue attending those. Rotary will also send annual reports of the financial performance of your endowed fund, as well as sample projects made possible by your support. Remember that you can always make additional contributions to your fund to see its impact grow even more.