

VISIONS

Charitable Estate & Financial Planning Ideas from The Rotary Foundation



**UNLOCK
INCOME
WHILE PROVIDING
HOPE
AROUND THE
WORLD**

The Rotary Foundation has a 100-year record of growth and impact. Fueled by generous friends, leaders, and problem-solvers who have a passion for positive change, Rotary is a charity you can trust to tackle the world's greatest humanitarian challenges and achieve your hopes for the future.

In 1917, Rotary International President Arch C. Klumph proposed an endowment “for the purpose of doing good in the world,” and The Rotary Foundation was born. One hundred years later, Rotary has touched the lives of millions of people, providing health and education where it is needed most. We hope that you take great satisfaction in the impact you have had in your own community and around the world through The Rotary Foundation.

If you are like most Rotarians, you have experienced a lifetime of successes and challenges. You have seen Rotary grow and expand its reach. You understand the importance of providing long-term support that will continue to improve the lives of future generations. Rotary is your partner, now and into the future.

You can make a gift today and Rotary will provide fixed payments to you and your spouse for life and support

Foundation programs in perpetuity. Your charitable gift annuity can turn cash or securities into an income stream. With rates ranging from 4 to 9 percent, a gift annuity may help you unlock the income potential of low-yielding assets.

What is your Rotary passion?

We encourage you to designate how the earnings on your gift will someday be used. You may elect to support water projects or education, for example, or you might prefer that a portion of the earnings go to your district each year. How will you change the world? It is your choice—it is your Rotary legacy.

Continue reading to learn more about how Rotary is your partner for a better future.



The Rotary Clubs of Palo Alto, CA and Bombay Metropolitan, Maharashtra, India partnered with another Indian charity to conserve the area's monsoon rainwater and prevent wells from drying up later in the year.

TWO GOALS, ONE GIFT

One special gift may accomplish your financial and charitable goals. Enjoy the security of fixed payments for life and the satisfaction of knowing you will be helping Rotary build a better future for individuals around the world.

Giving in this way is quite simple. You donate cash or appreciated securities to Rotary in exchange for Rotary's agreement to make fixed payments to one or two beneficiaries for life. Your payment rate depends on the beneficiaries' ages when the annuity is funded. Payments may be made monthly, quarterly, or annually by check or direct deposit to a checking or savings account.

After all lifetime payments have been made, the balance of your gift annuity will be used to provide ongoing support for your favorite Rotary Foundation programs through The Rotary Foundation's Endowment. Whatever program you choose, your gift will go on giving.

The Many Benefits of a Charitable Gift Annuity with Rotary

- provide lifetime payments for you and/or loved ones that will not change with interest rate or market changes
- supplement retirement assets with fixed payments
- unlock additional income from appreciated stock or low-yielding investments
- reduce or delay capital gains tax that would be due if you sold the assets outright
- qualify for a charitable income tax deduction at the time you make your gift
- receive a portion of each payment free of federal income tax for a period of time
- receive payments that are backed by the unrestricted assets of The Rotary Foundation
- receive Major Donor or Arch Klumph Society recognition for the full amount of your gift

WHO CAN BENEFIT?

You, spouse, partner, sibling, child, friend, or parent

Minimum Gift Amount **\$10,000**

Minimum Beneficiary Age **50**

Number of Beneficiaries **1 or 2**

THANK YOU FOR YOUR GENEROUS SUPPORT

When you make an outright gift to the Endowment or a commitment to give in the future, The Rotary Foundation Trustees are pleased to share their gratitude and offer membership in special societies.

Arch Klumph Society membership is reserved for individuals or couples who provide \$250,000 or more to The Rotary Foundation outright or through cumulative qualifying gifts. **Major Donor** recognition is awarded to those who have given \$10,000 or more outright.

Bequest Society membership is provided to those who have committed \$10,000 or more in financial support, usually through an estate plan or beneficiary designation. These donors receive special updates, invitations, and other materials including an exclusive pin and engraved crystal.

Naming opportunities are available for outright gifts and commitments for future gifts of \$25,000 or more. Your fund will bear your name or that of a loved one and will carry on your Rotary legacy. Annual financial updates to your district will let Rotarians of the future know that your generosity supports their projects. Customized naming and gifting opportunities are available.

By giving to The Rotary Foundation Endowment, you can save lives and enrich communities for generations to come. Learn more and customize your Rotary legacy today at rotary.org/legacy.



Local Rotary clubs and districts support your friends and neighbors who have lost their homes to natural disasters, helping them stabilize and rebuild by providing food, clothing, and basic financial assistance.

PDG Constance Crawford uses a charitable gift annuity to supplement her retirement income and strengthen her Rotary legacy.

Connie is a passionate Rotarian and retired educator from the small, rural community of Dunsmuir in northern California. In 2003 Connie funded a charitable gift annuity with Rotary to supplement her retirement income and ensure that Rotary's good work will continue for years to come. "I belonged to other organizations before," says Connie, "but when I saw what Rotary did, I wanted to be a part of it."

Connie became club president four years after joining the Rotary Club of Dunsmuir, embracing their motto "We may be small, but we do it all." She would go on to become governor of District 5160 and share many heartwarming experiences with new friends from other clubs in her district. Her favorite Rotary memories include working at a medical clinic in Costa

Rica and traveling to Mexico City to personally deliver wheelchairs to those in need.

Connie's charitable gift annuity is a natural outgrowth of her service through Rotary. She enjoys knowing that the remainder of her gift annuity flows into Rotary's Endowment, specifically the World Fund. There, her gift will be combined with the gifts of other Rotarians to provide ongoing support for Rotary Foundation projects year after year over the next century and beyond. "Together we can get things done."



*PDG Connie Crawford,
Rotary Club of Dunsmuir, CA*

LIVE YOUR ROTARY DREAM

Dr. Tim Siu (Rotary Club of Alhambra, CA) decided to join Rotary in 1968 to make new friends around the world. During his many years as a Rotarian, including 33 years of perfect attendance, he enjoyed traveling around the world establishing life-long connections. While visiting 162 countries, he experienced “the infinite happiness of sharing service projects that help humanity.” He shared his passion for service with his family, who embraced his love of Rotary by attending events, hosting dinners, and planning meetings in their home. Since his passing in 2013, the Siu family has kept in touch with several Rotarians and their families in other countries including Singapore, Thailand, Switzerland, New Zealand, and China.

Tim was well known for his unofficial role as in-house physician on Rotary trips, providing his colleagues with a sense of security when traveling far from home. According to his long-time Rotary friend Joe “Peppy” Sciarra (Rotary Club of Alhambra), there was nothing that Tim enjoyed more than serving as District Governor, which enabled him to support many other Rotarians who shared his passion and goals. Tim’s proudest moments as District Governor were inducting Sylvia Whitlock (Rotary Club of Duarte) as the first female Rotary club president in District 5300 and speaking to the United Nations about the global eradication of polio.

In 2001, Tim decided to fund a charitable gift annuity. Unlike many of his other generous gifts to The Rotary Foundation, Tim’s annuity supplemented his retirement income for more than a decade before his passing and will continue to provide regular payments to his wife, Dr. Annie Siu, for the rest of her life.

Tim’s dedication to building a better future continues through his Rotary family including members of the Alhambra Rotary Club, who display Tim’s District Governor banner at every meeting and sponsor the “Dr. Tim Siu Service Above Self Award” scholarship for graduating high school seniors. The impact of Tim’s efforts to think globally and act locally is magnified by the work of Rotary volunteers who have been inspired by his devotion to service and empowered by his generous support of the Foundation.



Past District Governor Tim Siu (Rotary Club of Alhambra, CA) balanced his philanthropic and financial goals with a gift that supports his wife, Annie, as well as the charitable efforts of his Rotary family.

GET STARTED!

Contact Rotary’s Planned Giving Team to discuss how a charitable gift annuity can fulfill your financial and charitable goals.

Give us your ideas about how you would like to help your family and build your Rotary legacy so we can prepare a no-obligation sample illustration that outlines payments and potential tax benefits to you.

When you are ready to fund your gift annuity, we will give you instructions for making your contribution and prepare the paperwork for you to sign.

FOR MORE INFORMATION

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Visit rotary.org/plannedgiving for more helpful information on gift and estate planning.