



Gifts of Life Insurance The Rotary Foundation – United States

A wonderful way to include The Rotary Foundation of Rotary International in your estate plans is by naming the Foundation a beneficiary of an insurance policy. Simply inform your insurance agent that you would like to make the Foundation a beneficiary or partial beneficiary of your insurance policy. Also, be sure to inform the Foundation of your plans so that we may properly recognize your generosity to the Permanent Fund (see chart below).

Donor Recognition for Beneficiary Designation

Foundation's Interest	Donor Recognition
US\$1,000 to \$9,999	Benefactor
US\$10,000 or more	Benefactor & Bequest Society

Another option in estate planning is designating The Rotary Foundation (TRF) irrevocable owner and sole beneficiary of a whole or universal fully or partially paid life insurance policy. There are a number of things to note prior to making TRF owner of a policy:

- Term life insurance policies are not accepted.
- The life expectancy of the insured must be less than 15 years on an actuarially determined basis.
- TRF may liquidate the policy for its net cash value.
- In order for TRF to assume ownership of a policy, TRF must be irrevocably named owner and full beneficiary.
- Policies that are partially paid will continue to be paid by the donor either through TRF or directly to the insurance company.

Prior to naming the Foundation owner of an insurance policy, please contact the Gift Administration Coordinator for more information.

Donor Recognition for a Fully Paid Policy

Foundation's Interest	Donor Recognition
US\$1,000 to \$9,999	Benefactor
US\$10,000 or more	Major Donor

Donor Recognition for a Partially Paid Policy

Foundation's Interest	Donor Recognition
US\$1,000 to \$9,999	Benefactor
US\$10,000 or more	Benefactor & Bequest Society

Contact Gift Administration for more information at 847/866-3380 or via email at GiftAdminstration@rotary.org