

THE ROTARY FOUNDATION CHARITABLE GIFT ANNUITY

A US tax deduction **and** payments for life for himself and his spouse

A world free from disease



Clean, drinkable water

The ability to read and write

Peace

Whose future would you like to help secure?

- ☐ Self and/or spouse
- ☐ The Rotary Foundation
 - ☐ Health & hunger
 - ☐ Education
 - ☐ Peace
- ☐ Rotary District # _____
- ☐ _____
- ☐ All of the above

Contact
The Rotary Foundation for
ideas on achieving your
personal, financial and
charitable goals.

CGA payment rates benefit You and The Rotary Foundation!

The gift annuity rates are calculated to provide **attractive payments to the donor** and/or other annuitant(s) and also to result in a **significant portion of the contribution remaining for The Rotary Foundation**.

The annuity payments are a percentage of the value of the original gift and are based on age. Please see below for sample rates available for a single-life annuity and call (847) 866-3833 for customized rates.

Age 60	5.0%
Age 70	5.7%
Age 80	7.1%

Your charitable gift annuity is a mutual relationship with The Rotary Foundation.

When you contribute cash or appreciated securities to fund an annuity, The Rotary Foundation agrees to pay an annual fixed amount for the lifetime(s) of up to two annuitants. Your personal legacy is solidified when The Rotary Foundation's Permanent Fund becomes the ultimate beneficiary of your generosity.

Can your gift pass the "The Four-Win Test"?

1. Make the gift of a lifetime now to support your favorite Rotary programs
2. Receive fixed payments for life
3. Achieve Major Donor status
4. Benefit from possible tax advantages

**A charitable gift annuity may make
your significant gift possible!**

Contact Jenna Steiner, Planned Giving Officer, today at (847) 866-3833 or jenna.steiner@rotary.org.



The Rotary Foundation of Rotary International

Please complete and return to Jenna Steiner, Planned Giving Officer
1560 Sherman Ave., FN110, Evanston, IL 60201-3698

☐ Please send me an illustration of possible benefits of a charitable gift annuity based upon the following birth dates: ____/____/____ (self) and ____/____/____ (spouse)
Month Day Year Month Day Year

☐ \$10,000 ☐ \$50,000 ☐ \$100,000 ☐ Other amount \$ _____

☐ I have included ☐ I would consider including The Rotary Foundation in my estate plans

Name(s) _____

Address _____

City _____ State _____ ZIP _____

Optional Information

Telephone _____

E-mail _____

Rotary Club _____ District # _____

Comments _____

Recommend a friend to receive CGA information _____



Perry and Lonalee Berkowitz of the Rotary Club of Vestal, NY, were proud of their \$10,000 Bequest Society commitment for The Rotary Foundation.

They had always wished, however, they could make a large gift during their lifetimes so the obligation would not fall to their son, who is the executor of their will.

After learning about charitable gift annuities, they decided to fulfill their bequest commitment in 2006, when they were both 64. In addition to the charitable tax deduction of \$3,299 they took the year of the gift, they will continue to receive annual payments of \$560 for their lifetimes.

"When we worked the numbers, it turns out that if we live long enough, **the payments should equal the amount we originally donated,**" Dr. Berkowitz said. "It was a no-brainer."

Their combined income was high in the years just prior to their retirement, but Dr. and Mrs. Berkowitz rely on the quarterly payment as an additional income now that both are retired.

Dr. and Mrs. Berkowitz, who became Rotary Foundation Major Donors with their charitable gift annuity, enjoy knowing their gift will benefit the world for generations to come. "The money in the Permanent Fund saves lives and continues to do that every year," Dr. Berkowitz said. **"You are not going to solve the world's problems in one step. You have to keep at it. The Permanent Fund allows that to happen."**



With

fixed payments

for life and attractive

tax benefits,

an agreement

during your lifetime becomes a

generous donation

to The Rotary Foundation

that benefits

future generations.

(847) 866-3833

jenna.steiner@rotary.org