



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