

# The Endowment Fund

- Enhanced Foundation programs since 1982
- Endowed fund invested permanently to build long-term stability for Foundation's future
- Key to Foundation's role tomorrow

## Endowment Fund

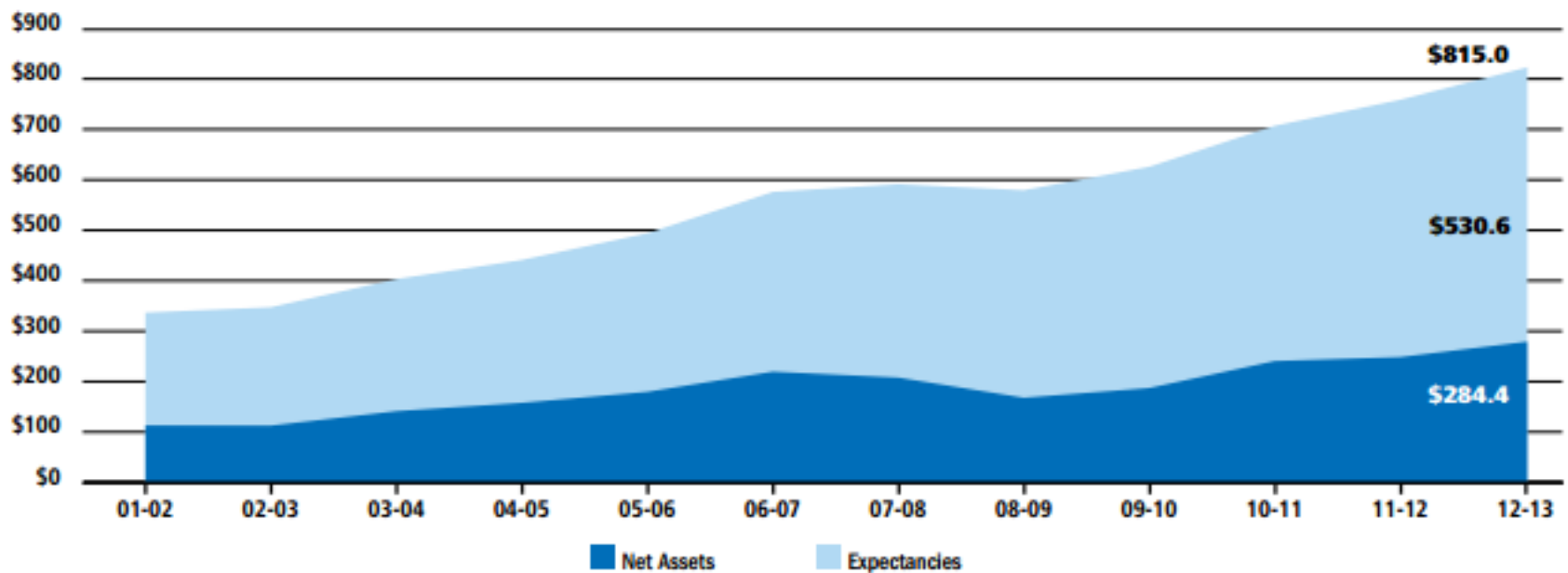
The Rotary Foundation established an endowment in 1982, now known as the Endowment Fund, to ensure a strong future for the Foundation by providing a continuous stream of income to meet the increasing demand for Foundation programs in perpetuity. Contributions to the Endowment Fund are invested and a portion of the income, as determined annually by the Trustees, is made available for spending.

Gifts to the Endowment Fund enable Rotarians and friends of Rotary to fulfill their local and global philanthropic goals.

The goal is to build the Endowment Fund to **US\$1 billion** by 2017

# The Endowment Fund

**ENDOWMENT FUND MARKET VALUE AND EXPECTANCIES (US\$ MILLIONS)**



Endowment Fund  
earnings already  
help support Rotary  
Foundation  
programs that  
advance our  
mission.



Gifts that benefit The Rotary Foundation after the donor's death.

Testamentary Gift options:

- Benefactor
- Bequest Society

## Benefactors and Recognition

A **Benefactor** is an individual or couple that has made a provision in their estate plan to gift a minimum US\$1,000 to The Rotary Foundation.

*Your legacy will make a lasting difference in the world*

The Permanent Fund builds long-term stability for the future of The Rotary Foundation of Rotary International by providing an extra stream of income to meet an increasing demand for the Foundation's educational, humanitarian, and cultural programs. By making you a benefactor, you are joining thousands in their efforts to improve and enrich lives of people around the globe.

A Benefactor of The Rotary Foundation is anyone who informs the Foundation in writing that he or she has made a provision in his or her will, or other estate plan, naming the Foundation's Permanent Fund as a beneficiary or anyone who makes an outright gift of US\$1,000 or more to the Rotary Foundation Permanent Fund.

The Rotary Foundation appreciates information about commitments from which it will benefit in the future. We recognize the highly personal nature of these commitments. Unless we receive a later direction from you, this letter of recognition will be used to name this provision. Please send above to the Benefactor Designated a Post Office Address if you wish. The Trustees are grateful for your gift and for your permission to publish your name as a Benefactor in that post-estate plan in appropriate forms.

www.rotary.org

**BENEFACTOR GIFT COMMITMENT**

I expect my gift will amount to US\$ \_\_\_\_\_  
(A minimum commitment of US\$1,000 is required for your membership in the days of Rotary. Additional information on the donor's legacy can be obtained at www.rotary.org)

My Benefactor commitment to The Rotary Foundation's Permanent Fund will be in the form of:  
☐ Will/Bequest ☐ Outright gift ☐ Other (please specify) \_\_\_\_\_

I designate that the spending portion of my gift will be applied to:  
☐ as the Trustee's discretion (World Fund) ☐ through SIDA (Special Designated Fund and World Fund)  
(Should no designation be specified, the funds will be applied to the program approved by the World Fund)

Name \_\_\_\_\_ (please print name in permanent or appropriate business address) District \_\_\_\_\_ Rotary Club \_\_\_\_\_  
Address \_\_\_\_\_ Date \_\_\_\_\_  
Telephone \_\_\_\_\_ E-mail \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Please return this income portion of the card to the appropriate address listed on reverse side.



Benefactor Commitment Card: 149-EN

# Leaving a Legacy of Hope – The Bequest Society

**Bequest Society** member is an individual or couple that has made a provision in their estate plan to gift a minimum <sup>US</sup>\$10,000 to TRF.



Bequest Society Membership Card: 098-EN



## Bequest Society Recognition

### **Bequest Society Level 1**

US\$10,000 – 24,999.99

One Diamond Circle Pin

### **Bequest Society Level 2**

US\$25,000 – 49,999.99

Two Diamond Circle Pin

### **Bequest Society Level 3**

US\$50,000 – 99,999.99

Three Diamond Circle Pin

### **Bequest Society Level 4**

US\$100,000 – 249,999.99

Four Diamond Circle Pin

### **Bequest Society Level 5**

US\$250,000 – 499,999.99

Five Diamond Circle Pin

### **Bequest Society Level 6**

US\$500,000 – 999,999.99

Six Diamond Circle Pin

### **Bequest Society Level 7**

US\$1,000,000 +

Seven Diamond Circle Pin



- Discuss your estate plans with your spouse and children
- Become a Benefactor
- Talk with your financial planner about the benefits of Planned Giving
- Contact Planned Giving staff at TRF to discuss specifics about your estate planning situation

Thank you for your Support

As of June 2013 worldwide there are:

- More than 85,000 Benefactors
- More than 8,000 Bequest Society Members

In District 9685

- 105 Benefactors
- 20 Bequest Society Members.

Please consider becoming a supporter of the TRF  
***Endowment Fund*** by leaving a personal legacy  
with Rotary.