

**District 5170****TRF News Today****October 2023**

Current News of District 5170 and The Rotary Foundation

**From the District TRF Chair, Orrin Mahoney:**

Next month is Foundation Month for Rotary, and we are right in the middle of District 5170's Annual Fund Drive. The annual fund is critical to the District as it directly affects future DDF contributions that are the heart of our Global Grants doing good around the world. In order to promote the Foundation directly to the District membership, I again have been presenting the Foundation as a club program. I have done several presentations already and they have been well received. I focus on the connection between your contribution and the leverage achieved through the Global Grant process. If done correctly, you can actually get more money back for your project than the total donated. While the total annual fund donation is critical, we also have a continued focus on EREY. While a generous District overall, historically, we have up to 40% of our members with no donation to the Rotary Foundation Annual Fund. In order to qualify for EREY, each member needs only to donate at least \$25.

**TRF 2023-24 Drawing****Overall Annual Fund**

- 1 point for every \$100 contribution to the Annual Fund (and polio)
- Prize is \$5,000 in DDF. Worth \$9,000 if used in a Global Grant

**EREY Drawing**

- Each Club has an equal chance if they achieve EREY status.
- Prize is \$2500 in DDF. Worth \$4,500 if used in a Global Grant

For Overall Annual fund, contributions as of Mar 1, 2024

Drawing at the March Leadership Meeting

For EREY, contributions as of July 1, 2024 (measured in late July)

Drawing at the August Leadership Meeting

We will be continuing the two drawings to encourage donations to the Annual Fund. For the first drawing, each Club will get chances in the drawing based on their total giving. The more each Club donates the better the chance of winning. The prize is significant as it is \$5000 in DDF, worth \$9000 when used in a Global Grant. In order to support smaller Clubs and promote EREY, there is a second drawing where each EREY Club has an equal chance at a prize of \$2500 in DDF, worth \$4500 when used

in a Global Grant. As you may remember, we had a record setting year in 2021-22, with over \$1 million to the Annual Fund, followed by almost \$1 million in 2022-23. I am confident that we can do it again this year.

# THE UNCOMMON MAN

By PDG Russ Hobbs, Rotary Club of Santa Cruz

What a blessing in my life it has been to know Richard D. King. Just two days ago, some of us were having lunch with him after his recent time in the hospital, and he was joking about how his doctor told him it was time to “dust off some of his old speeches and get back to speaking.” But now (Oct 10, 2023) that beautiful baritone voice is silent.



Rick was really more of a story-teller than a speech giver; he never used a Power Point presentation with bullet points to get his message across. Rather, he used words that touched our hearts and made us laugh or moved us to tears to make his points. A Rick King speech was more like a “magic carpet ride.” Rick knew how to capture an audience and transport us to another time and place where he and Cheri had been, and Cheri was always an important part of every story. As a Past President of Rotary International, Rick with Cheri at his side traveled to every corner of the world, met with Rotarians, kings and queens, prime ministers, and the presidents of most of the countries in the world. But he told me when I was District Governor that “no club was too small for him

to come and give a talk.” Rick believed that Rotary was how God used ordinary people to do his work on earth, and his personal and Rotary motto was “Mankind Is Our Business.”

There are some people that are just “Bigger than Life” and Rick King was that to me. He served his country with distinction as a Captain in the United States Army during the Vietnam era. He served our District with distinction as District Governor in 1982-1983. He served our Zone with distinction as the Zone director in 1989-1991. And he served Rotary International with distinction as the International President in 2001-2002. I loved hearing Rick talk about “the early days” when he would be suing in the morning, singing in Las Vegas in the evening (where he met his wife Cheri), and then flying back home in the wee hours of the morning. When Cheri agreed to marry Rick, she asked him “how long does this Rotary stuff last,” to which he responded—it is just for one year honey, so don’t worry about it. But like their marriage, it lasted for a lifetime.

I know that we all have our favorite memories of Rick, and as I thought about mine, I first thought about the time Rick did his cabaret show at my District Conference in Monterey. Rick sang his favorite songs, Cheri danced, and I got to accompany him on my drums. I thought about the time I got to be his aid for three days at Richard Flanders’s District Conference in San Ramon. But I think my favorite memory was two days ago when some of us got to just sit with Rick and chat at his favorite mom and pop restaurant in Danville, while having a burger & fries. We have all heard Rick give his speech about “the Uncommon Man”, and ask the question “Who Touched You”? And for most of us the easy answer is Rick touched us, because he was the Uncommon Man.

Rest in peace my friend.

## Remembering Past Rotary International President Rick King

By District Governor Hung Wei

Today, Rotary suffers a tremendous loss - our fearless and beloved leader, Past Rotary International President Rick King, passed away on October 10, 2023. Rick represents the best of Rotary and has been a guiding star in District 5170. Every living District Governor in Rotary District 5170 has received Rick's personal mentoring and unconditional encouragement – he was an advisor, an encourager, a maker of leaders, and most importantly, a friend!

To quote PDG Susan Valenta:

“The room will always be a little lonely without Rick King, but it will be filled with the memories of an individual who made a difference in the world and left a lesson plan that others could follow to make that world even better.”

Rick King is Rotary! We will miss him dearly.

Best regards,  
Hung (Wei)  
2023-2024 Rotary District 5170 Governor  
Past President and Member of the Rotary Club of Cupertino

## A Moving Video Tribute to Rick King

Courtesy Marley Productions

Click [HERE](#) or visit <https://vimeo.com/873610983/834740f629?share=copy> to see and hear a moving tribute to past Rotary International President Rick King created by PDG Arley Marley III in 2018 for Rick's 50<sup>th</sup> year in Rotary.



The Rotary Foundation transforms your gifts into service projects that change lives both close to home and around the world.

Since it was founded more than 100 years ago, the Foundation has spent more than \$4 billion on life-changing, sustainable projects.

With your help, we can make lives better in your community and around the world.

# The Major Donor's Journey Continues

By Pat McMenamin, District 5170 Major Donor Chair



In the spirit of caring, 2023-2024 Rotary International President Gordon R. McNally, is breaking new ground by asking all Rotary members to “Create Hope in the World” and become champions in our effort to illuminate mental health needs near and far. This includes helping one another feel more supported, advocating for mental health services, and building bridges with experts in the field to expand access to treatment.

President McNally notes, “It’s something that should feel familiar to every Rotary member – because everything we do is in the spirit of caring, giving, friendship and compassion, and has been from the beginning of our organization.”

“What makes Rotary powerful isn’t just what we do for the communities we serve. We also support and empower each other, by creating a safe space for our members to bring their whole, authentic selves. We show each other comfort and care.”

“These connections are deeply meaningful. The U.S. surgeon general recently declared loneliness a public health epidemic. Dr. Vivek Murthy said, “We must prioritize building social connection the same way we have prioritized other critical public health issues such as tobacco, obesity, and substance use disorders.

President McNally states, “I am proud of what Rotary has done across generations to build those kinds of social connections – and the Rotary magazine focused on loneliness in its January 2023 issue. Our worldwide community and our foundational value prioritizing Service Above Self makes Rotary a powerful global advocate for mental health.”

McNally notes that mental health care fits comfortably within several of our areas of focus. As of May, there are 41 global grant-supported projects with a mental health focus.

Rotarians believe that we have a shared responsibility to address our world’s most persistent issues.

The Rotary Foundation’s seven areas of focus help set Rotary’s global priorities, so that we can harness our collective strength to improve the health and livelihood of communities near and far worldwide. Major Donors are often inspired to champion one or more of Rotary’s several areas of focus:

*Continues on Next Page*



**Providing clean water, sanitation, and hygiene**

**Basic education and literacy**

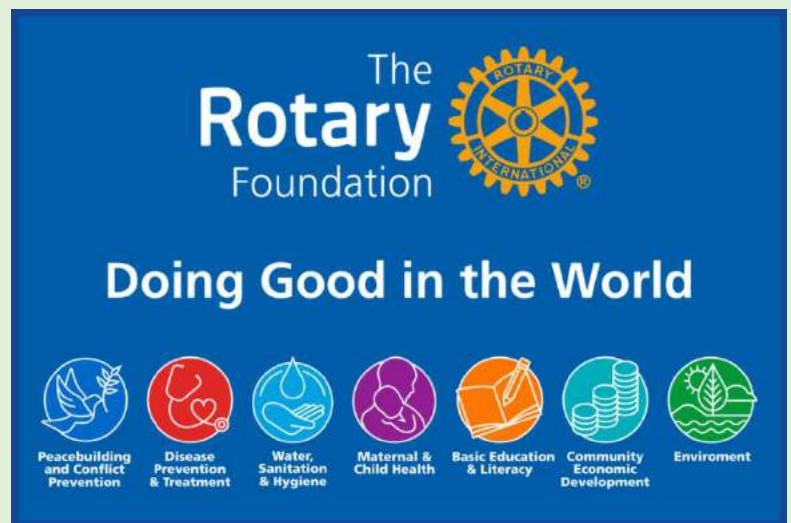
**Fighting Disease**

**Saving mothers and children**

**Growing local economies**

**Promoting peace**

**Protecting the environment**



Rotarians design achievable, sustainable projects, and share the plans with knowledgeable partners, community leaders, and experts to draw on their experience. We craft projects within organizational guidelines to ensure that we're improving lives in the most lasting, effective, and meaningful ways. Whether you are about to make your first donation as a Rotarian or you are already a Major Donor of The Rotary Foundation, please take a few moments to reflect upon your 2023-2024 giving goals to The Rotary Foundation of Rotary International.

The people who make Rotary so effective, through their generosity and passion for positive change, come from all over the world and all walks of life. Even so, they share a powerful common trait: they're compelled by a desire to share their good fortune with others, simply because they can make a positive impact for someone whose life has not been easy.

"In Rotary, we indeed measure our value not by what we have, but by what we have given, by the good we have done in the world, and by our capacity to do even more."

R. Ravindran 2015-16 President, Rotary International, and  
Ray Klinginsmith 2015-16 Trustee Chair, The Rotary Foundation

*For more information, please contact: Pat McMenemy, 2023-2024 D5170 TRF  
Committee, Major Donor, Chair phone/text: 925-980-6881  
email: [pjmcmenemy@mac.com](mailto:pjmcmenemy@mac.com)*

EVERY  
ROTARIAN  
EVERY  
YEAR

# Around the Clubs

## Rotary Club of Gilroy Supports GUSD Middle School Suicide Prevention Week Gilroy Rotary Club provides materials for Mindful Jar Project

For its Summer Community Service Project, the Rotary Club of Gilroy came together and provided materials for 1,276 mindful jars. We provided these materials to the school counseling departments at all 3 middle schools in the Gilroy Unified School District, to be used by the students to create mindful jars during their Suicide Prevention Week activities.



Rosie Ramon, a school counselor at Solorsano Middle School, explained that these jars are a wonderful visual aid for helping the students relax when they experience stress, anxiety, or are overwhelmed for any reason. It is explained to the students that the jar represents their head, the water their mind, and the glitter their thoughts or worries. While their thoughts (glitter) are calm and quiet at the bottom of the jar, their mind (water) is clear, and they are able to focus.

Shaking the jar and creating a clouded swirl of thoughts and emotions (glitter) is representative of their mind during times of stress and anxiety. The simple act of paying attention to their breath and slowing it down while they watch the glitter slowdown in the jar is a very powerful exercise. When their mind is focused on the jar and they are taking slow, deep breaths, it takes the focus off their thoughts and emotions, and the brain chatter reduces.

Gilroy Rotary president, Nita Eddie-Mitchell pointed out that, "We are always looking for ways to make a positive impact in our community. Given that mental health is an area of focus for Rotary International this year, this project aligned perfectly with that goal." In addition to the materials for the mindful jars, Rotarians raised enough money to provide each middle school with \$755 to support the monthly Cookies with Counselors activity. In the past, the counselors have generously provided the cookies from their personal funds.





# The 2023-24 Annual Giving Campaign is Underway!

By Annual Giving Chair PDG Tim Lundell

Our Rotary year is already one-quarter gone, and all Clubs have now set their Annual Fund goals, which accumulate to make up our District goal, and my job, as Annual Giving Chair, is to help each of our 63 Rotary Clubs, and YOU, accomplish what we collectively set out to do! How does it work? Each Club has a TRF Chair who will be responsible for reaching out to each member, providing updates to the Club not only on fundraising progress but also on the good work that your TRF contributions do. Soon your Chair will be distributing Pledge Cards, for each member to commit to their contribution amount this year. Your Chair will also be a cheerleader for EREY ("Every Rotarian Every Year"), the Foundation program encouraging EVERY Rotarian to contribute at least \$25 each year to TRF. And then.... it's up to YOU! And there are so many ways to give! (1) Give a check to your TRF Chair...this week!; (2) Go to [Rotary.org/donate](https://Rotary.org/donate), where you can pick a cause and amount, and pay by credit card; (3) Choose the easiest road of all by signing up for Rotary Direct (using the form below, or calling (866) 976-8279), where your small monthly donation is automatically made each month, adding up to a very nice contribution by the end of the year. And never forget to remind yourself: there is no other charitable contribution you can make that goes to work immediately, but then three years later returns 50% of the contributed amount for your Club to use again! Thank you!!

## The Rotary Foundation 2023 - 2024 PLEDGE CARD

Rotary Club of \_\_\_\_\_

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_



For the 2023-2024 Rotary Year, I Pledge:

- ☐ To be a Double Sustainer (\$200)  
☐ To be a Super Sustainer (\$500)  
☐ To be a Grand Sustainer (\$1,000)  
☐ Entry Level - EREY (\$25)  
☐ Rotary Direct / \$ \_\_\_\_\_ per month  
☐ Other \$ \_\_\_\_\_

☐ Annual Fund

☐ Polio Plus

Signature: \_\_\_\_\_

Make checks payable to: The Rotary Foundation

☐ **YES! I INTEND TO GIVE US\$1,000 OR MORE ANNUALLY AND WILL JOIN THE PAUL HARRIS SOCIETY.\***

☒ **YES! I WILL ENROLL IN ROTARY DIRECT.**

Name \_\_\_\_\_

**IF YOU ARE A ROTARIAN, PLEASE COMPLETE.**

Rotary membership ID \_\_\_\_\_

Club name \_\_\_\_\_

Club number \_\_\_\_\_

Billing address \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_

Postal code \_\_\_\_\_ Country \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Contributions are tax deductible where allowed by law. For security purposes, please do not send credit card contributions via email.

\*Note: By checking this box, donors notify The Rotary Foundation of their intention to contribute US\$1,000 or more every Rotary year to the Annual Fund or PolioPlus Fund. Learn more at [rotary.org/phs](https://rotary.org/phs).

### GIFT DESIGNATION (choose one)

- ☐ Annual Fund — SHARE ☐ Eradicating polio ☐ Promoting peace  
☐ Fighting disease ☐ Providing clean water ☐ Supporting education  
☐ Saving mothers and children ☐ Growing local economies ☐ Responding to disasters

### RECURRING GIFT AMOUNT (minimum US\$10)

☐ \$25 ☐ \$85 ☐ \$100 ☐ \$250 ☐ \$1,000 ☐ Other \_\_\_\_\_

Currency (if not US\$) \_\_\_\_\_

### FREQUENCY

☐ Monthly ☐ Quarterly ☐ Annually (specify month) \_\_\_\_\_

☐ **CHECKING ACCOUNT**, please attach a voided check

*Available for U.S. and Canada bank accounts only*

*Not available online*

### CREDIT OR DEBIT CARD

☐ Visa ☐ MasterCard ☐ AmEx ☐ Discover

Card number: \_\_\_\_\_

Expiration   /   CVN

Signature \_\_\_\_\_



Your privacy is important to Rotary International and The Rotary Foundation (collectively, "Rotary") and the personal data you share with Rotary will only be used for official Rotary business, such as for Rotary fundraising purposes, financial processing, donor recognition, and record keeping. Personal data collected with this contribution is subject to Rotary's Privacy Policy found at [rotary.org/privacy](https://rotary.org/privacy).



## The Race is On!!!

Club	MEMBERS	EREY ELIG	EREY GIVING	EREY%	Annual Fund Goal 2023-24	Annual Fund through 10/6/23	Annual Fund % to Goal	AF Per Capita	PolioPlus
Alameda	43	43	43	100%	\$11,000.00	\$4,760.00	43%	\$110.70	\$1,150.00
Almaden Valley-Willow Glen	25	24	3	13%	\$4,000.00	\$490.00	12%	\$19.60	\$0.00
Campbell	16	16	2	13%	\$2,600.00	\$1,250.00	48%	\$78.13	\$1,400.00
Capitola-Aptos	43	42	1	2%	\$10,000.00	\$2,000.00	20%	\$46.51	\$0.00
Castro Valley	58	58	12	21%	\$10,000.00	\$5,225.00	52%	\$90.09	\$750.00
Cupertino	206	206	65	32%	\$60,000.00	\$25,360.00	42%	\$123.11	\$650.00
Dublin	42	42	14	33%	\$13,000.00	\$4,263.00	33%	\$101.50	\$1,095.00
East Palo Alto Bayshore	19	18	8	44%	\$1,000.00	\$445.00	45%	\$23.42	\$0.00
E-Club of Silicon Valley	44	44	8	18%	\$5,000.00	\$2,540.00	51%	\$57.73	\$850.00
E-Club of Silicon Valley Health &	46	46	0	0%	\$500.00	\$0.00	0%	\$0.00	\$0.00
E-Club Silicon Valley Smart Village	39	39	0	0%	\$500.00	\$0.00	0%	\$0.00	\$0.00
Evergreen Valley	17	17	1	6%	\$100.00	\$100.00	100%	\$5.88	\$0.00
Freedom	43	43	4	9%	\$2,500.00	\$325.00	13%	\$7.56	\$0.00
Fremont	32	21	1	5%	\$13,000.00	\$8,250.00	63%	\$257.81	\$500.00
Fremont Bridge	21	30	8	27%	\$2,000.00	\$336.00	17%	\$16.00	\$0.00
Fremont Morning	14	13	0	0%	\$3,000.00	\$250.00	8%	\$17.86	\$75.00
Fremont-Union City-Newark Sunset	21	21	3	14%	\$2,250.00	\$255.00	11%	\$12.14	\$0.00
Gilroy	96	50	36	72%	\$20,000.00	\$1,258.00	6%	\$13.10	\$0.00
Gilroy After Hours	50	94	7	7%	\$0.00	\$1,035.00	0%	\$20.70	\$0.00
Gilroy Sunrise	16	16	2	13%	\$2,100.00	\$225.00	11%	\$14.06	\$200.00
Hayward	60	59	2	3%	\$5,000.00	\$420.00	8%	\$7.00	\$0.00
Hollister	60	51	0	0%	\$4,000.00	\$0.00	0%	\$0.00	\$0.00
Livermore	94	93	12	13%	\$72,000.00	\$6,980.00	10%	\$74.26	\$940.00
Livermore Valley	49	45	4	9%	\$12,000.00	\$6,350.00	53%	\$129.59	\$100.00
Los Altos	167	162	3	2%	\$40,000.00	\$2,534.66	6%	\$15.18	\$0.00
Los Altos Sunset	9	9	1	11%	\$1,800.00	\$2,000.00	111%	\$222.22	\$0.00
Los Gatos	138	135	9	7%	\$35,000.00	\$3,620.00	10%	\$26.23	\$80.00
Los Gatos Morning	39	39	13	33%	\$20,000.00	\$3,340.00	17%	\$85.64	\$420.00
Milpitas	23	23	0	0%	\$5,000.00	\$0.00	0%	\$0.00	\$0.00
Mission San Jose	21	21	1	5%	\$2,500.00	\$250.00	10%	\$11.90	\$250.00
Morgan Hill	99	99	30	30%	\$25,000.00	\$7,765.00	31%	\$78.43	\$0.00
Mountain View	27	27	0	0%	\$7,000.00	\$0.00	0%	\$0.00	\$900.00
Newark	40	39	3	8%	\$4,000.00	\$500.00	13%	\$12.50	\$40.00
Niles (Fremont)	100	100	13	13%	\$30,000.00	\$3,640.00	12%	\$36.40	\$3,290.00
Oakland	259	256	6	2%	\$100,000.00	\$6,110.00	6%	\$23.59	\$0.00
Oakland Uptown	13	12	4	33%	\$6,000.00	\$700.00	12%	\$53.85	\$200.00
Palo Alto	119	114	1	1%	\$20,000.00	\$1,200.00	6%	\$10.08	\$100.00
Palo Alto /University	83	82	3	4%	\$15,000.00	\$6,839.89	46%	\$82.41	\$0.00
Piedmont-Montclair	24	23	4	17%	\$2,000.00	\$800.00	40%	\$33.33	\$0.00
Pleasanton	72	70	61	87%	\$20,000.00	\$3,015.00	15%	\$41.88	\$319.40
Pleasanton, Dublin, Livermore (Tri-	12	12	0	0%	\$2,000.00	\$0.00	0%	\$0.00	\$0.00
Pleasanton North	71	66	2	3%	\$20,100.00	\$1,200.00	6%	\$16.90	\$0.00
San Francisco Bay Area	0	20	2	10%	\$2,000.00	\$84.00	4%	\$0.00	\$0.00
San Jose	409	397	1	0%	\$40,000.00	\$1,100.00	3%	\$2.69	\$250.00
San Jose East-Evergreen	22	20	2	10%	\$200.00	\$700.00	350%	\$31.82	\$0.00
San Jose Silicon Valley	15	14	2	14%	\$10.00	\$590.00	5900%	\$39.33	\$0.00
San Juan Bautista	32	31	19	61%	\$4,000.00	\$2,129.00	53%	\$66.53	\$0.00
San Leandro	47	47	39	83%	\$15,000.00	\$3,104.07	21%	\$66.04	\$207.57
San Lorenzo Valley (Felton)	43	42	5	12%	\$6,000.00	\$2,225.00	37%	\$51.74	\$40.00
Santa Clara	52	51	1	2%	\$10,000.00	\$250.00	3%	\$4.81	\$100.00
Santa Cruz	103	103	5	5%	\$15,600.00	\$6,700.00	43%	\$65.05	\$0.00
Santa Cruz Sunrise	113	113	98	87%	\$30,000.00	\$6,095.00	20%	\$53.94	\$40.00
Saratoga	85	85	7	8%	\$30,000.00	\$6,850.00	23%	\$80.59	\$850.00
Scotts Valley	18	16	0	0%	\$3,800.00	\$0.00	0%	\$0.00	\$0.00
Silicon Valley	68	68	0	0%	\$25.00	\$0.00	0%	\$0.00	\$0.00
Silicon Valley Chinese	24	23	0	0%	\$500.00	\$0.00	0%	\$0.00	\$0.00
Silicon Valley For Global Impact	54	54	0	0%	\$2,000.00	\$0.00	0%	\$0.00	\$0.00
Silicon Valley Passport	38	37	1	3%	\$2,000.00	\$250.00	13%	\$6.58	\$0.00
Silicon Valley Rainbow	17	16	2	13%	\$2,800.00	\$800.00	29%	\$47.06	\$0.00
Silicon Valley Star	14	14	1	7%	\$1,500.00	\$75.00	5%	\$5.36	\$0.00
Sunnyvale	62	62	2	3%	\$12,500.00	\$450.00	4%	\$7.26	\$1,000.00
Sunnyvale Sunrise	10	10	1	10%	\$2,000.00	\$1,000.00	50%	\$100.00	\$0.00
Watsonville	64	64	0	0%	\$10,000.00	\$0.00	0%	\$0.00	\$100.00
San Jose State Univ. Rotaract Club					\$0.00	\$0.00	0%	\$0.00	\$0.00
Santa Cruz County - Rotaract Club					\$0.00	\$0.00	0%	\$0.00	\$0.00
<b>DISTRICT TOTALS</b>	<b>3,760</b>	<b>3,707</b>	<b>578</b>		<b>\$800,885.00</b>	<b>\$148,033.62</b>			<b>\$15,896.97</b>



# Liz Sez:

BY LIZ GALLEGOS, BEQUEST SOCIETY AND MAJOR DONOR CHAIR

## DO NOT READ – UNLESS YOU ARE AGED 70 ½



**Hurrah!** You have reached a milestone and joined over 23 million U.S. people aged 70 ½ and older. Once you attain this age, you receive an exclusive opportunity if you are charitably inclined *and* own an IRA (Individual Retirement Account).

You can direct a gift of any size up to \$100,000 per year to your favorite philanthropic causes – like The Rotary Foundation. This is called Qualified Charitable Distribution (**QCD**). Some IRA accounts will allow you to direct this transfer through your online account, or you can contact your IRA Administrator.

Once reaching the required beginning age, you are required to take a **minimum distribution (RMD)** that your IRA Administrator calculates. (Beginning in 2023, the age for RMDs increases from 72 to 73). If you are fortunate that you or your family do not need the funds or would like the most efficient way to make charitable gifts, then directing your RMD using the QCD from your IRA to TRF (The Rotary Foundation) may be most advantageous. This process has the added advantage of fulfilling your RMD requirement.

**Just as at age 70 ½, you continue to be eligible to make gifts of your RMD up to \$100,000 per year from your IRA.**

But what about the tax impact, many people ask? Besides the euphoria of making a charitable gift and seeing your gift support Rotary today, another benefit to you is that you do not have to recognize or claim the income on your income tax return, nor do you get to claim the charitable deduction. You direct the QCD to go directly from your IRA to The Rotary Foundation. Simple as that! Since this method of giving does not count as income, it may also reduce your annual income level, which may help lower Medicare premiums and decrease the amount of Social Security subject to tax. You receive the satisfaction of making a tax-efficient gift to support The Rotary Foundation, contributing towards your club goals for Annual Giving *and* your donation is invested to benefit future Rotary projects.

Who doesn't love a bargain?

To learn more or to how to direct a gift from your IRA to TRF, [use this link](#), contact me by email/phone at [ergallegos@aol.com](mailto:ergallegos@aol.com) or 408 391-7800. Let us know if you have initiated a QCD so that we can thank you and be sure that when your IRA gift is received, it is appropriately recognized and linked to your record. *While we encourage and celebrate philanthropy, we always remind you to check with your professional advisors and family to determine what benefits your circumstances.*

P.S. – Did you know that you can also name The Rotary Foundation and D5170 as a remainder beneficiary of your IRA? Ask me how!

*The Estate Plan Review Checklist on the two pages that follow can help you to ensure that you consider all aspects of your estate plan.*

# ESTATE PLAN REVIEW CHECKLIST

BY REFLECTING ON THESE QUESTIONS, YOU CAN ENSURE ALL ASPECTS OF YOUR ESTATE PLAN ARE CONSIDERED, KEEPING THE PLAN ROBUST AND IN LINE WITH YOUR EVOLVING NEEDS AND WISHES. REGULAR REVIEWS AND UPDATES ARE ESSENTIAL FOR PEACE OF MIND.

## POTENTIAL UPDATES:

### UPDATE INFORMATION

Have my personal or family details changed recently?

### LEGAL DOCUMENTS

Are all my documents notarized, updated, and stored in a safe place?

### BENEFICIARIES & DISTRIBUTION OF ASSETS

Have recent life events influenced my beneficiary decisions?

### EXECUTOR, TRUSTEE, & GUARDIAN APPOINTMENTS

Are the appointed individuals still available and willing to play their roles?

### GUARDIANSHIP FOR MINOR CHILDREN

Have there been changes in the guardians' circumstances or in the needs of my children?

### ASSETS AND LIABILITIES

Have I had significant financial changes, acquisitions, or debt settlements recently?

### DIGITAL ASSETS AND ONLINE ACCOUNTS

Have I documented and made accessible all my digital assets, including passwords?

## ACTION ITEMS:

- ☐ Ensure all vital information is up-to-date. Accurate information ensures a smooth transition and minimizes potential disputes.
- ☐ Check the legitimacy of all legal documents. Proper documentation is the foundation of an effective estate plan.
- ☐ Review beneficiaries and distribution plans. Life changes might necessitate adjustments to my wishes.
- ☐ Confirm all appointments. This ensures that trusted individuals are in place to fulfill my wishes.
- ☐ If applicable, assess the choice of guardians for any minor children.
- ☐ Update my list of assets and account for any debts. An accurate inventory provides a comprehensive overview of my estate's net worth. A list makes it easier for your Fiduciaries to understand your financial picture.
- ☐ Manage my digital presence. Digital assets can have both significant value and sentimental importance. Your last will and your power of attorney documents must have a provision to allow your Fiduciaries access to your online accounts.

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## POTENTIAL UPDATES:

### BUSINESS INTERESTS

Have changes been made in my business structure, ownership, or vision?

### HEALTHCARE DIRECTIVES

Do my current directives still reflect my wishes regarding medical care?

### POWER OF ATTORNEY

Does my current power of attorney align with my comfort level?

### CHARITABLE CONTRIBUTIONS

Have my charitable intentions or preferred organizations shifted recently?

### ESTATE TAX CONSIDERATIONS

Are there new tax laws or changes that might affect my estate?

### REAL ESTATE AND PROPERTY OWNERSHIP

Have there been changes in my property ownership or intentions for those properties?

### LONG-TERM CARE PLANNING

Have there been significant changes in my health that influence my long-term care decisions?

## ACTION ITEMS:

- ☐ Review any business interests and their management. This ensures alignment with your future vision for the business.
- ☐ Review living wills and healthcare proxies, again to make sure you have the most reliable Fiduciaries to make health-related decisions on your behalf. Medical preferences can also evolve over time.
- ☐ Evaluate your choices for financially durable power of attorney or successor trustee if your assets are held in a revocable living trust. A trusted individual should be in place if you're unable to manage your own affairs.
- ☐ If you want to make a difference for charities in your estate plan, it's important to speak with your attorney and other advisors on this matter. Charitable intentions can change over time, and you also might want to decrease or increase your allocation to various charities.
- ☐ Stay informed about potential tax impacts. The federal estate and gift tax exemption is scheduled to dramatically decrease at the end of 2025 without new Congressional action. If your estate is greater than \$5m, you may want to become more informed on how this impacts your estate.
- ☐ Review the title of your real estate to ensure it transfers to the property beneficiaries.
- ☐ Reevaluate any provisions in your documents for long-term care. If you have long-term care insurance make sure your Fiduciaries, and other loved ones, are aware of the policy and where to locate it.

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## POTENTIAL UPDATES:

### FAMILY DYNAMICS

Have new family dynamics emerged that I should consider in my estate plan?

### ESTATE PLANNING GOALS

Do my estate planning goals align with my current vision for the future?

### LEGAL AND FINANCIAL PROFESSIONALS

Are the professionals I've worked with still available and suitable for my needs?

### WITNESSES AND SIGNATURES

Are all my documents properly signed and witnessed as per legal standards?

### REVIEW SCHEDULE

When did I last review my estate plan, and when should I next revisit it?

### COMMUNICATE CHANGES

Have I informed relevant individuals about the most recent changes to my estate plan?

### LETTER OF INSTRUCTIONS

Is my letter of instructions clear, up-to-date, and does it cover all essential details?

## ACTION ITEMS:

- ☐ Consider any shifts in family dynamics or relationships. New in-laws, new divorces, marriages, or deaths that impact my plans.
- ☐ Reflect on my overarching goals and objectives.
- ☐ Check in with professionals who've assisted with my estate plan. Will they retire and who are their successors?
- ☐ Ensure all documents have the proper signatures and witnesses under your appropriate state law.
- ☐ Set a routine for estate plan reviews. Any new family dynamic, wealth event, or federal tax change, might be a reason.
- ☐ Share updates with relevant parties, most importantly your beneficiaries. For example, if you want to leave 10% to charity in your estate plans, simply let your adult children know during your lifetime of your intentions.
- ☐ Create or update a comprehensive non-legal document to guide families and fiduciaries. This can include a wide variety of information such as burial arrangements, beneficiaries for your tangible personal property, directions for managing certain investments, and essentially everything else important to you that's not addressed in your last will.

## Orrin and Carolyn Mahoney share their motivations for funding a Charitable Gift Annuity.

"Rotary is an important part of our lives and we know firsthand the impact members make around the world through The Rotary Foundation."

"We have always wanted to give at a higher level but we weren't in a position to do so until the opportunity to make a charitable gift annuity with our retirement assets became available. By giving in this way, we were able to make a meaningful charitable gift without outliving our means, show our commitment to The Rotary Foundation by becoming Level 3 Major Donors, and know that our planning today will ensure a steady stream of DDF to our district in the future so that members can continue making an impact for generations to come."

"A Planned Giving Officer helped us each step of the way and made it easy – we hope others who are in a position to do so will follow our example."





## From the Grants Corner

**October 2023**

**By Cecelia Babkirk, District Grants Chair - Global**



This article will be mercifully brief, but it contains useful information and dates, if you are or plan to be sponsoring a global grant.

In connection with that, we get a lot of questions about how to start. At the Avenues of Service event a few weeks ago, we decided the training should not be a deep dive, but rather, training sessions for those who have never done a grant and want to know how to get started. It was well attended and there were good questions. You will find that presentation at [rotarydistrict5170.org](http://rotarydistrict5170.org), in the grants section (which is in The Rotary Foundation) section of the site.

New this year is a series of grant trainings, each radiating out from the initial training at the Avenues of Service Event. All of us on the grants team have agreed that a logical progression, based on the order of importance should be:

December 9 - Areas of Focus

February 3 - Community Assessment and Sustainability

April 6 - 20 - How to get funding for your project (DDF, MTM, OPM, oh my!)

June 8 - So, I have an idea for a project - how do I move forward?

All the training sessions will be via Zoom.

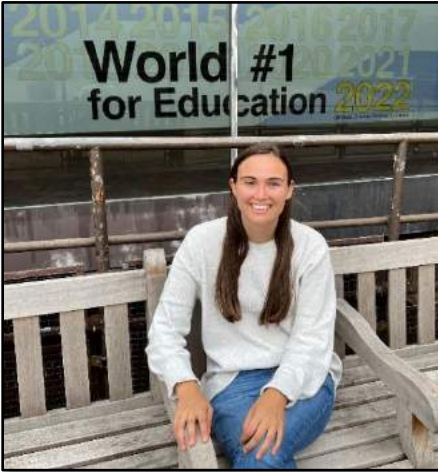
All the training sessions will be an hour and a half, with the first hour being the training and the remaining time being for questions and answers.

Reminders and a link will be sent two weeks before each training.

This will be a great time to learn more and get your questions answered by our crack team of grant reviewers. We'll talk about them in the next TRF Today newsletter. In the meantime, feel free to contact any of us if you have questions. Here is how:

Sangita Seshadri	RC Saratoga, Co-DGSC	<a href="mailto:sangitaseshadri@gmail.com">sangitaseshadri@gmail.com</a>
Padma Chari	RC Cupertino	<a href="mailto:padma.lotus.chari@gmail.com">padma.lotus.chari@gmail.com</a>
Karen Berner	RC Los Altos	<a href="mailto:karenberner@gmail.com">karenberner@gmail.com</a>
Cecelia Babkirk	Rotary eClub Silicon Valley	<a href="mailto:rotariancecelia@gmail.com">rotariancecelia@gmail.com</a>

## A Message from our Global Grant Scholar, McKenzie Lynch



Greetings from London! My name is McKenzie Lynch and I am a Global Grant Scholar studying Museums and Galleries in Education at University College London. I have had an amazing experience being sponsored by the Los Altos Rotary Club and District 5170 as well as being hosted by the Dulwich, Peckham, and Crystal Palace Rotary club in London. From the first moment I arrived on UK soil back in September, I was welcomed by my host Rotarian, Adrian Faiers, with a smile and a ride from the airport to my accommodation. He and his partner, Shirley, who is an alumna of my department, have made me feel right at home along with their two other Global

Grant Scholars from Canada and Belgium. It has been incredible to meet scholars from around the world going through the same journey and to learn about their Rotary experience.

My program has also introduced me to students from other countries who share a passion for art's ability to educate across cultures. We learn from our professor's expertise in the heritage, museum, and education sectors in addition to field trips with staff members from education departments in arts institutions across London. My projects have included redesigning a curriculum, creating a digital education tool, writing a funding proposal for a social justice partnership, in addition to research papers and fieldwork conducting program evaluations. Along with my coursework, I am part of a mentorship scheme with alumni from University College London that has helped me expand my network, and Rotarians have also connected me with previous Global Grant Scholars from District 5170 living in London who have been invaluable in giving advice.



I have loved attending Rotary club meetings and events where I have gotten to know more Rotarians and scholars. The Radlett Club hosted a Scholar's Diner where we all got together with our hosts and during the Lord Mayor's Parade through London, I had the pleasure of cheering for Rotary's float. A special event was the London District Conference where hundreds of Rotarians from the region were in attendance, and I got to speak on stage about the Global Grant Scholarship. The Rotary community has been like a family to me where we've attended each other's extracurricular activities such as a fellow scholar's orchestra

*Continues on Next Page*

recital and my Irish dance performance for St. Patrick's Day. Currently I am completing a work placement at an arts education foundation for my program, and I am excited to share all that I have experienced with Rotarians when I return to California. Thank you for this life-changing opportunity. I am honored to be writing about it in the TRF News Today!



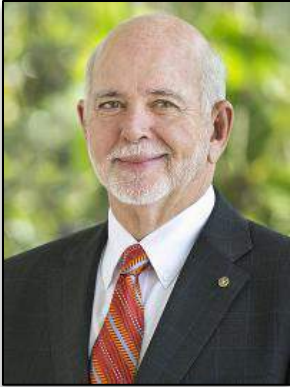
Orientation Day for London's Global Grant Scholars





# ***RI Trustee Chair's Message***

Barry Rassin  
Trustee Chair, 2023-24



## **October 2023**

On 24 October, we renew our commitment to our top humanitarian goal for World Polio Day.

This year, let's remember a young health worker in Pakistan known as Bibi Marjana (Miss Marjana). She braves the snow and cold in the mountains to vaccinate 84 children in rural areas, visiting each home, often miles apart.

Marjana is one of the thousands of frontline workers in Afghanistan, Pakistan, and outbreak areas I consider heroes in the final push to end polio. The work they do, coupled with the vision of our partners and the support you give, is moving mountains.

With Rotary's partnership, the Global Polio Eradication Initiative is aggressively pursuing two key goals from its 2022-26 strategy. First, we aim to halt wild poliovirus type 1 transmission. This year, only six cases have been documented as of this writing. Could this be the year we see the last of these poliovirus cases? We're cautiously optimistic that it might.

Second, we aim to report the final case of circulating vaccine-derived poliovirus type 2, or cVDPV2, in outbreak countries. About 80 percent of cVDPV2 cases last year occurred in subnational areas of the Democratic Republic of Congo, Nigeria, and Yemen. We must implement tailored strategies to stop the virus in these areas.

Other challenges persist, including political tensions, security risks and access issues, and the lasting effect of the pandemic in Afghanistan and Pakistan.

Despite these challenges, we are making progress. Poliovirus strains are diminishing, as is the number of affected regions where polio once prevailed. A new vaccine we have introduced reduces the incidence of the circulating vaccine-derived virus type 2.

Rotary is the organization that had the audacity to take on a global effort to protect children everywhere from disability or even death due to polio. We must have the tenacity to see it to the finish line.

What can you do to help us get there, you ask? Join or initiate a PolioPlus Society in your club or district and engage all members in this historic moment. And don't forget that the Bill & Melinda Gates Foundation continues to amplify Rotary's donations to polio eradication with a 2-to-1 match for every dollar.

You can also advocate the cause of polio eradication with governments to secure political and financial support and promote Rotary's leadership role in all media.

Like Marjana marching up the mountain, we have our goal in sight, and we will keep going until we get there.

# ROTARY TRIVIA

## Trivia Question No. 1:

We all know and are proud of the achievements of Past RI Presidents, the late Rick King and the late Cliff Dochterman, both members of Northern California Rotary Clubs. But exactly how many past RI Presidents, including Rick and Cliff, hailed from California Rotary Clubs:

- (a) 2 (i.e., just Rick and Cliff);
- (b) 4;
- (c) 6;
- (d) 9; or
- (e) 11?



## Trivia Question No. 2:

How many past RI Presidents hail from Rotary Clubs in India:

- (a) 1;
- (b) 2;
- (c) 3;
- (d) 4; or
- (e) 6?

## Trivia Question no. 3:

When was the Rotary Club of Tokyo chartered by RI:

- (a) 1921;
- (b) 1931;
- (c) 1948;
- (d) 1952; or
- (e) 1964?

Answers on last page of this newsletter

# ANSWERS

*Answer to trivia question no. 1: (d) Nine past-presidents of RI hail from California Rotary Clubs.*

*Answer to trivia question no. 2: (d) Four past-presidents of RI hail from Rotary Clubs in India.*

*Answer to trivia question no. 3: (a) The Rotary Club of Tokyo was chartered by RI in 1921.*

The  
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