From: Rotary International <US.Group.Exemption@msgfocus.rotary.org>
Sent: Wednesday, October 28, 2026 9:01 AM
To: Beverly Mendel <office@rotary5450.org>
Subject: Important IRS information for Rotary districts and Rotaract clubs

Dear 2026-27 club and district officers,

Our records indicate that your Rotary district or Rotaract club is included in Rotary International's group exemption.

Please read the email carefully because it includes reminders about filing your annual information, as well as **new requirements that your club or district needs to meet to be included in Rotary International's group tax exemption.**

Reminder: File your annual information return by 15 November
The IRS requires all Rotary districts and Rotaract clubs in the U.S., including its territories, to file an annual information return. For clubs and districts whose tax year follows the Rotary year, the next filing due date is 15 November 2026.

The form your club or district needs to file depends on its gross receipts for its tax year. Visit the IRS website for details about annual reporting requirements for tax-exempt organizations.

Timely filing is important. The IRS automatically revokes the tax-exempt status of any organization that fails to meet its annual filing requirement for three consecutive years. Learn more about automatic revocation on the IRS website.

If your club or district has already completed its annual filing requirement for this year, you may disregard this reminder.

New in 2027: Additional filing requirements for clubs and districts included in Rotary International's group exemption
The IRS has issued new administrative requirements that affect how Rotary International maintains group exemption status for U.S. clubs and districts.

As a result, in the coming months, clubs and districts that are currently a part of Rotary's U.S. group exemption will receive a survey to collect information related to club and district activities and finances. **Clubs and districts that don't complete the survey won't be included in Rotary International's group exemption, which could put your club's or district's tax-exempt status at risk.**

To ensure the proper leaders receive this survey, please ensure that the contact information for district and club officers is up to date on My Rotary.

We're providing this information in advance so you know what changes are coming and what to expect in the months ahead.

For more information, see the attached FAQ.

If you have specific tax-related questions, we recommend consulting a qualified tax adviser or contacting the IRS.

Thank you for your attention to these important requirements.

Sincerely,

Rotary International

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