



# Endowment Mini-Session February 10, 2024

# THE ROTARY FOUNDATION

Doing Good in the World



# WHAT IS THE ENDOWMENT FUND?

- Gifts to Rotary's Endowment ensure that future Rotarians will have the resources they need to design and implement sustainable projects year after year.
- Rotary strives to increase the value of your gift to the Endowment by preserving and investing your initial contribution and spending only a portion of the earnings.



# HOW DID THE ENDOWMENT START?

- At the 1917 convention, outgoing Rotary president Arch Klumph proposed setting up an endowment “for the purpose of doing good in the world.” That one idea, and an initial contribution of \$26.50, set in motion a powerful force that has transformed millions of lives around the globe.
- 1947: The Foundation established its first program, Fellowships for Advance Study, later known as Ambassadorial Scholarships.





# YOUR LEGACY, ROTARY'S PROMISE

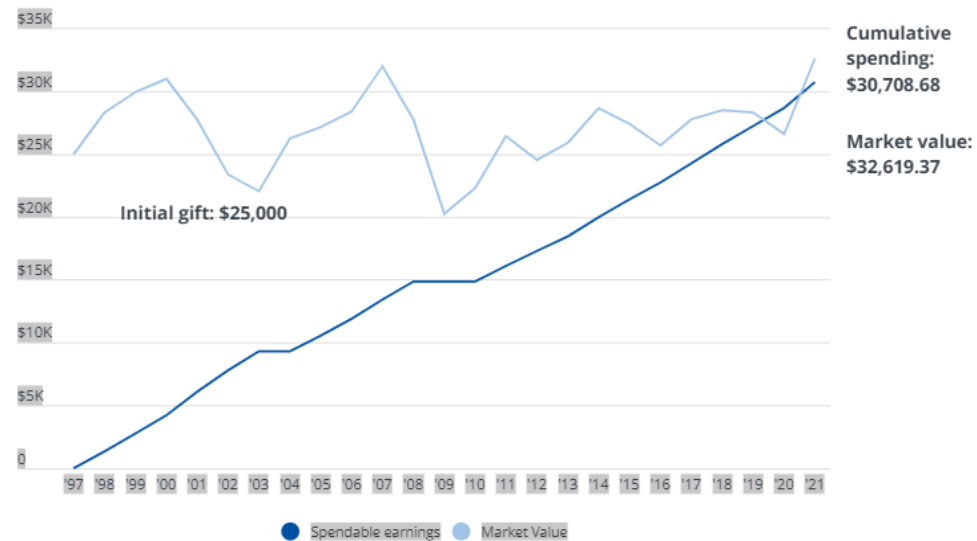
- Give to the Endowment today and watch as the value of your gift grows and investment earnings improve communities.
- Secure your vision for the future by including a commitment to the Foundation in your will or estate plan.



# HOW DOES THE ENDOWMENT WORK?

Planned gifts to Rotary's Endowment support the same life-changing programs forever.

## How your gift can grow and give



The illustration depicts past performance and cannot be relied upon as an indicator of future performance.

Imagine the tremendous impact of your legacy after more than 100 years of investment, not only in the markets but also in sustainable projects that change lives.

How will your legacy change the world?

# USES OF THE ENDOWMENT

To date....

200 + peace fellow scholarships funded by Rotary's Endowment in the name of the donor or their honoree &



\$195 Mil is the value of named donations made to Rotary's Endowment that continuously support our programs

# ENDOWMENT GIFTS

Your GIFT can be assigned to ANY cause YOU wish.

The GIFT can be in YOUR name, an honoree's name, OR remain anonymous




# IN OUR DISTRICT



## **Louis J. Stoiber Endowed Global Grant Scholarship**

- **Mrs. Ada K. Stoiber**
- **Inception: 30-Jun-1990**
- **Gift Value: \$161,000.00**
- **Market Value: \$328,915.52**
- **Market Value As Of: 31-Dec-2023**
- **Fund: Endowment Fund**
- **Gift Type: Endowment**
- **Endowment Type: Individual**
- **Stewardship Description: The spendable earnings from the fund shall support global grant scholarships.**

A large, dark blue, multi-pointed starburst graphic with a white outline, containing white text.

This Endowment has  
funded 3+ Global Grant  
Scholarships of  
\$30,000 each  
SO FAR!




# IN OUR DISTRICT



## Mary K. McMunn Endowed Global Grant Scholarship

- Mary K. McMunn
- Inception: 31-Oct-2012
- Gift Value: \$250,000.00
- Market Value: \$323,254.73
- Market Value As Of: 31-Dec-2023
- Fund: Endowment Fund
- Gift Type: Endowment
- Endowment Type: Individual



This Endowment  
has funded 2 Global  
Grant Scholarships  
of \$30,000 each  
SO FAR!

In our District we fund ONE Scholarship each year, and rotate the funding on a THREE year basis

Year one – Stoiber

Year two – McMunn

Year three – DDF (District Designated Fund)

# BEQUEST TESTAMENT



## A WORLD STRENGTHENED BY PEOPLE OF ACTION

"I wanted my estate to continue to provide for the community when I was gone. I felt there was no better way to do so than to establish a bequest."

Megan Tilley, center, Rotary Club of St. Ives, Australia

# LEGACY TESTAMENT



## A WORLD FOR OUR CHILDREN

“My Rotary legacy will provide a better future for the children of the world, immortalizing my progeny’s dedication to doing good.”

Ravi Vadlamani, right, Rotary Club of Guntur, India

# ONE OF OUR OWN...



## A WORLD FUELED BY SERVICE

"My family's gifts to The Rotary Foundation honor friendships we have made around the world. We are thankful for the opportunity to serve and to give."

**PDG William (Bill) Gray, & Nancy, Rotary Club Cataraqui-Kingston, Canada**




# ENDOWMENT FUND DESIGNATIONS

- The principal of a contribution to the Endowment is never spent, but a portion of the earnings is made available annually for specific program activities. An outright gift or commitment of any amount can be designated to Rotary's Endowment to provide support of the following programs:
- **WORLD FUND** The World Fund provides general support, wherever the need is greatest. It offers an opportunity for every Rotary district and club to participate in Foundation programs.
- **SHARE** Gifts designated for SHARE are split between the World Fund and District Designated Funds to participate in Foundation programs to improve communities locally and around the world.
- **AREAS OF FOCUS** Gifts designated for global grants support humanitarian projects, scholarships, and vocational training teams in a Rotary area of focus of your choice
- **ROTARY PEACE CENTERS** Gifts to the Rotary Peace Centers support the Foundation's partnerships with leading universities around the world to train professionals in conflict resolution, peace studies, international relations, and related disciplines.



# GLOBAL GRANTS NAMING OPPORTUNITIES

- By making an outright gift or a commitment in their estate plans, donors can support their favorite Rotary program forever.
- **CUSTOMIZED GLOBAL GRANT FUND** Donors may tailor their fund to emphasize their philanthropic priorities.
  - Activity (humanitarian project, scholarship, or vocational training team)
  - Area of focus
  - District that will sponsor the grant
  - Geographic location (such as Africa, Asia, or Latin America)
- When the donor selects the district that will sponsor the grant, the district will be able to access the available earnings for a global grant project.
- When the donor does not specify a district, the available earnings will be applied by the Foundation to a global grant after it is approved as part of the Foundation's match of District Designated Funds.



Like the Stoiber  
or McMunn  
Named  
Endowments

# ROTARY PEACE CENTERS NAMING OPPORTUNITIES

- The Rotary Foundation offers special opportunities to create a customized fund within Rotary's endowment that will provide ongoing support for the Rotary Peace Centers in perpetuity.
- Donors can create a lasting legacy in their name or in honor of a loved one. Donors who create an endowment during their lifetime receive an annual financial summary on the performance of their fund.
- Different levels of donations will support programs ranging from 1-4 years for Masters Degrees, Professional Development Certificates, Seminars or Retreats at Rotary Peace Centers around the world.



## Your Rotary Legacy

### Yes, I/we have made a commitment to The Rotary Foundation Endowment.

Name(s) to appear on recognition materials and/or for future publication:

Address:

City, state or province, country, and postal code:

E-mail:

#### Optional:

Rotary ID # Rotary club name

Rotary district:

Date(s) of birth:

Home, business, and/or mobile phone:

The details and amount of your commitment will always remain confidential. Rotary may share your name unless you request anonymity.

#### The spending portion of the gift shall be:

- ☐ Unrestricted (World Fund)
- ☐ Directed to:
- ☐ SHARE (World Fund and District Designated Fund)
  - ☐ Rotary Peace Centers
  - ☐ One or more areas of focus:
    - ☐ Peacebuilding and conflict prevention
    - ☐ Disease prevention and treatment
    - ☐ Water, sanitation, and hygiene
    - ☐ Maternal and child health
    - ☐ Basic education and literacy
    - ☐ Community economic development
    - ☐ Environment

- ☐ Please contact me at the phone number above to discuss gift designation preferences.

### The bequest will be funded by (some gift options are not available in all regions):

- ☐ Will or living trust
- ☐ Retirement plan beneficiary designation
- ☐ Life insurance beneficiary designation
- ☐ Donor advised fund
- ☐ Charitable remainder trust
- ☐ Other (please describe):

### The gift to The Rotary Foundation is expected to be:

US\$:

(The dollar amount is used for recognition purposes; if no amount is selected we will default to Level One.)

#### Recognition options:

For those who commit \$10,000 or more, one recognition pin per person will be automatically shipped to a home address.

My/our recognition preferences are noted below:

- ☐ I/we do not wish to receive an engraved crystal. (for commitments of \$25,000 or more).
- ☐ I/we would like a pendant with the pin(s).
- ☐ Tell me more about special naming opportunities.
- ☐ Send all recognition materials to this address instead:

- ☐ I/we have another request. (Please describe):

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

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

Please return this form and any supporting documents you wish to share that name Rotary as beneficiary. Contact information for your nearest Rotary office is featured on the reverse.

# ENDOWMENT COMMITMENT

<https://rotary.planmygift.org/documents/r/rotary-international-foundation/pdf-legacy-commitment-form-letter.pdf>

For Questions, Details, or to Donate Contact:  
Sue Bellor – District 7040 Endowment Chair  
Carol Tichelman – Zone 28/32 Major Gifts Advisor  
Carolyn Ferguson – Staff, Senior Major Gifts Advisor



# EVERY PENNY HELPS and DESERVES THANKS!

## Benefactors start at \$1,000 USD

## Bequest Society starts at \$10,000 USD



# STEWARDSHIP



**CHARITY NAVIGATOR**

Your Guide To Intelligent Giving

**America's largest independent charity evaluator has given  
The Rotary Foundation a TOP Four-Star  
rating for 15 consecutive years!!!**

- Transparency
- Accurate reporting
- Meeting reporting deadlines

	Score out of 100	Rating
Overall Score & Rating	100.00	
Financial	100.00	
Accountability & Transparency	100.00	

# MORE IN-DEPTH LEARNING



- ❖ Rotary International – My Rotary – Learning Center
- ❖ District Quarterly Foundation/International Meetings
- ❖ District Foundation Team
- ❖ District Resource Network
- ❖ Current Donors

Remember – **ALL** contacts (names, emails, phones) are available on the District Website – Just check out the Foundation committee OR member name and click on the one you want!! **WE ARE HERE TO HELP!**

Did you know that Rotary is celebrating 119 years of "Doing Good" in the world in February?

We think this is worth celebrating together!

Join our upcoming session where we'll have the pleasure of hosting Rotary staff members-Senior Major Gift Officer Carolyn Ferguson and Senior Annual Giving Officer Edina Mehovic.

They will provide the latest updates about the programs and impact of The Rotary Foundation, a distinctive membership benefit of Rotary. Let's come together to mark this milestone and deepen our understanding of the impactful work facilitated by your support of The Rotary Foundation.

Your participation will enrich our celebration and contribute to our collective mission of service and goodwill.

Sessions will be held:

**21 February (MONTREAL) 4:00 - 5:15 PM**  
Pointe Claire Curling Club ~ 250 Lanthier Ave.  
Pointe-Claire, QC

**22 February (OTTAWA) 6:30 - 7:45 PM**  
Elmvale Acres Public Library, 1910 St Laurent  
Blvd, Ottawa Ontario K1G 1A4.

**23 February (KINGSTON) 12:00 - 1:15 PM**  
Kingsbridge Retirement Community-950  
Centennial Drive, Kingston Ontario K7M 0G8

**24 February (MASSENA, NY) 10:30 - 11:45 AM**  
Morley's American Grill-240 E Orvis St, Massena,  
NY 13662. Optional social lunch to follow.

More event details will follow shortly.  
Please RSVP your attendance so we can save  
you a chair! We look forward to seeing you there!



Carolyn Ferguson  
Senior Major Gifts Officer



Edina Mehovic  
Senior Annual Giving Officer

# UNIQUE FOR D7040!!

In just under 2 weeks, we have TWO RI Staff Officers coming to see US!

The events will be informal, conversation style events to help you further understand and appreciate giving to The Rotary Foundation!!!

Please plan to attend an event near YOU!

**RSVP needed to Barbara Fisk**

[befisk@tpiqualitytravel.ca](mailto:befisk@tpiqualitytravel.ca)