

# TRF PRESENTATION FOR D5000 FINANCIAL AND ESTATE PLANNERS

Engaging Rotary to Open Opportunities



# TRF Major Gifts and Endowment Team



Tom Yuzer  
Endowment/Major Gift  
Adviser



Erin Groble  
Planned Giving Officer



Beth Garrow  
Regional Major Gift  
Officer

# THE ROTARY FOUNDATION

A charity you can trust



Rotarians raised  
**\$395.1 million**  
for the  
Foundation



# ROTARY'S IMPACT



# OUR CAUSES



**PROVIDING  
CLEAN WATER**



**SUPPORTING  
EDUCATION**



**FIGHTING  
DISEASE**



**SAVING MOTHERS  
AND CHILDREN**



**GROWING  
LOCAL ECONOMIES**



**PROMOTING  
PEACE**

# POLIO PLUS

With your help, we can  
end polio for good.

99.9%





# OPPORTUNITIES TO SUPPORT TRF



## Annual Fund

Supporting Communities Today



## Directed Gifts

Supporting Global Grants and Areas of Focus



## PolioPlus

Polio Eradication - TRF's Primary Initiative  
All gifts matched 2:1 by The Bill and Melinda Gates Foundation



## Endowment Fund

Securing the Future

“Through the Endowment, each individual has a voice in Rotary’s promise of a better world.”

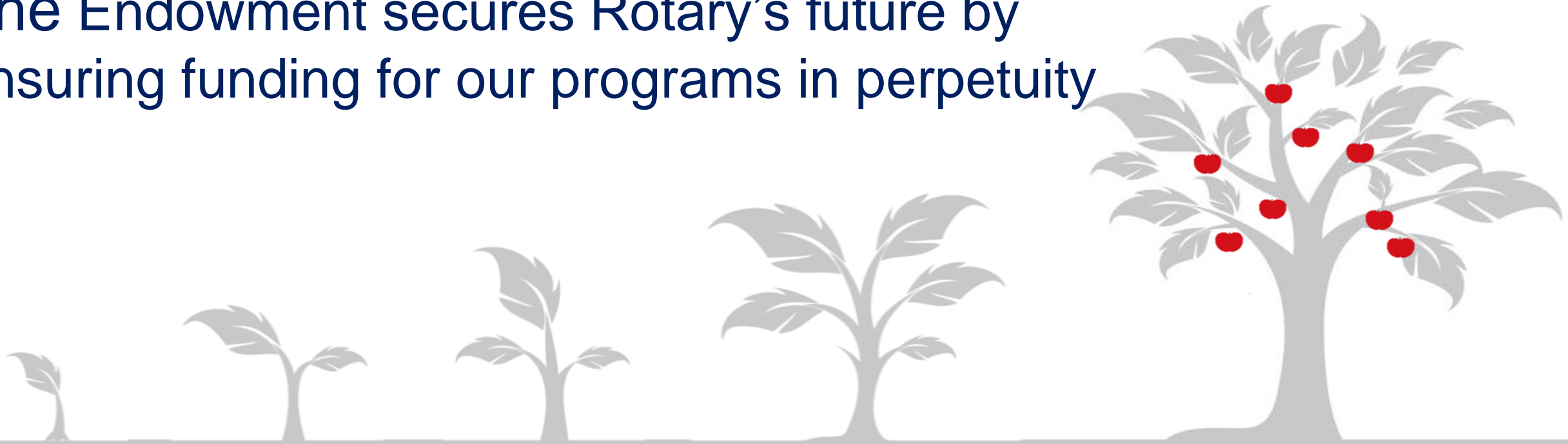
Naomi Williams

Rotary Club of Gainesville, FL

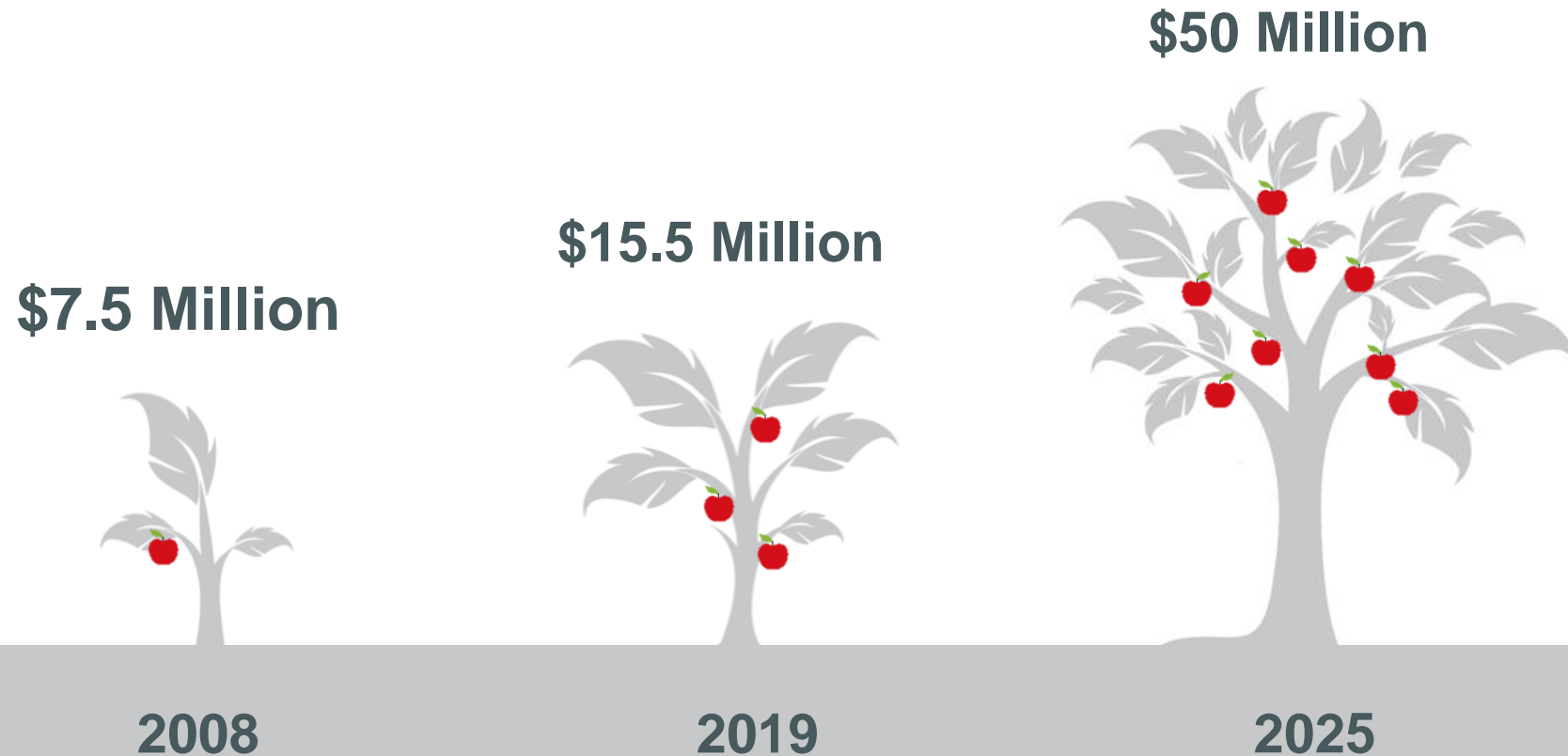


# YOUR LEGACY, ROTARY'S PROMISE

The Endowment secures Rotary's future by ensuring funding for our programs in perpetuity

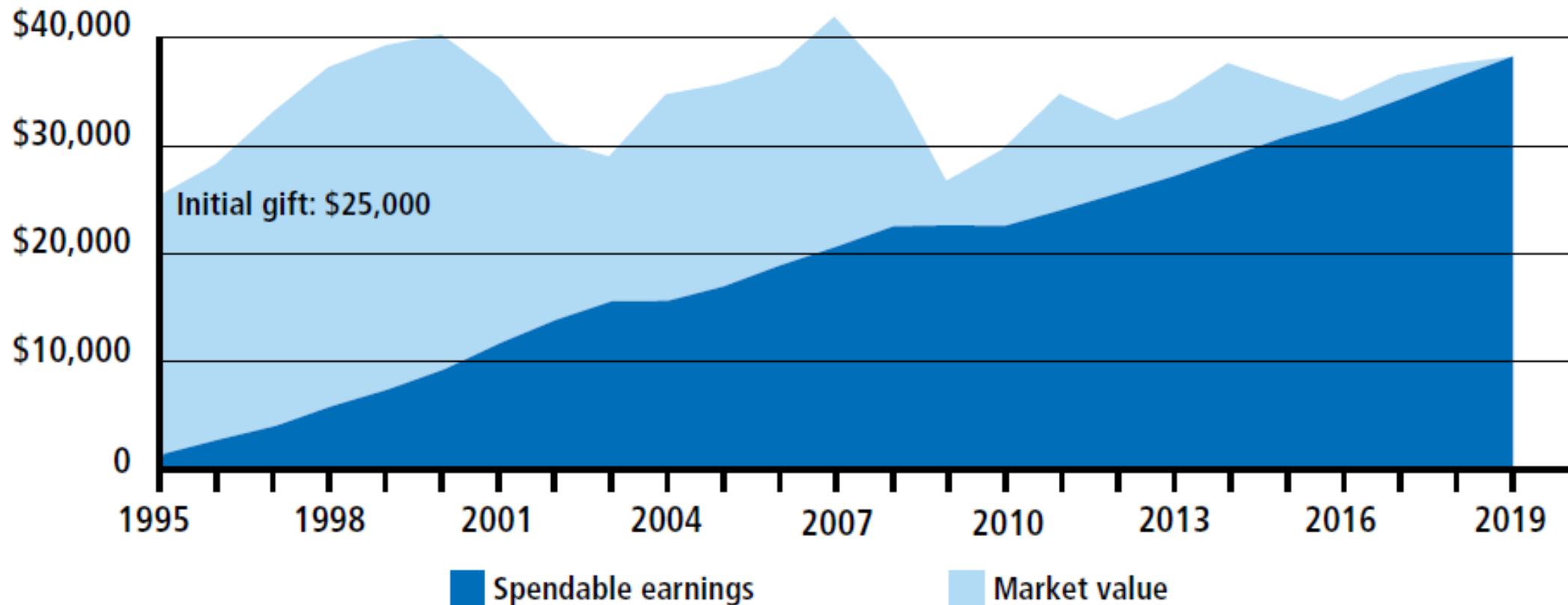


# YOUR LEGACY, ROTARY'S PROMISE





# YOUR LEGACY, ROTARY'S PROMISE



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

# NAMED ENDOWED FUNDS

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## Customize your Rotary Legacy

- Gifts of \$25,000+
- Specify the purpose of your gift
- Name your fund as your personal legacy in honor of a loved one
- Inspire others to plan their own Rotary legacy





# RECOGNITION

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Outright gifts and gifts that provide income have the following recognition

- **Major Donor** (\$10,000+)
- **Arch Klumph Society** (\$250,000+)

Commitments for future estate gifts are afforded the following recognition levels

- **The Bequest Society** (\$10,000+)
- **Legacy Society** (\$1,000,000+)



# GIFT PLANNING OPPORTUNITIES



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Bequests

Appreciated Securities

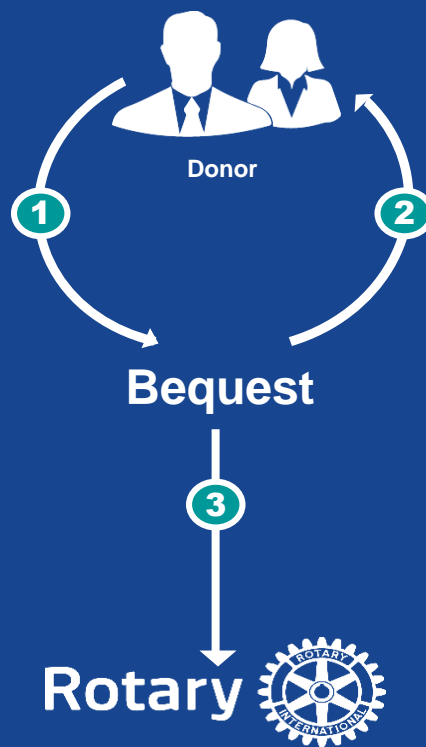
Charitable Remainder Trusts

Retirement Assets

Donor Advised Funds

# BEQUESTS

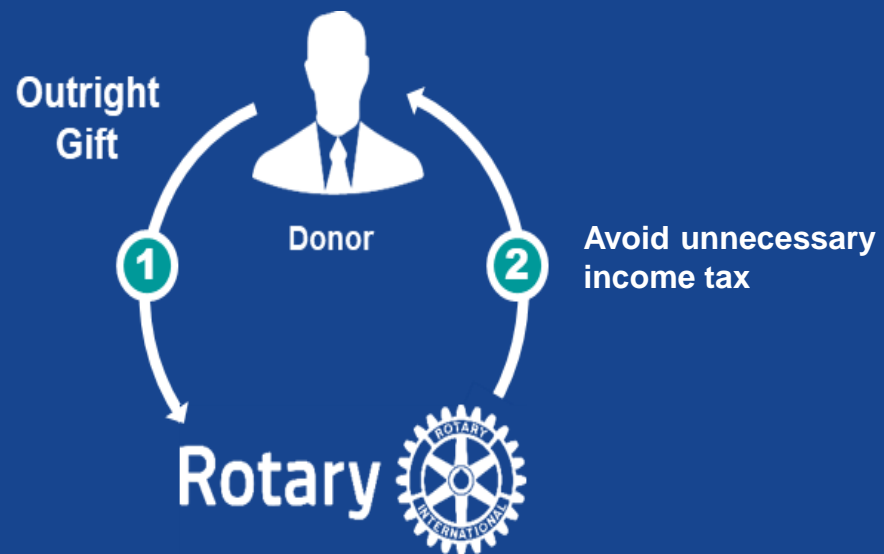
Revocable commitment for a future gift by naming Rotary in your estate plan or as a beneficiary of a retirement or life insurance plan



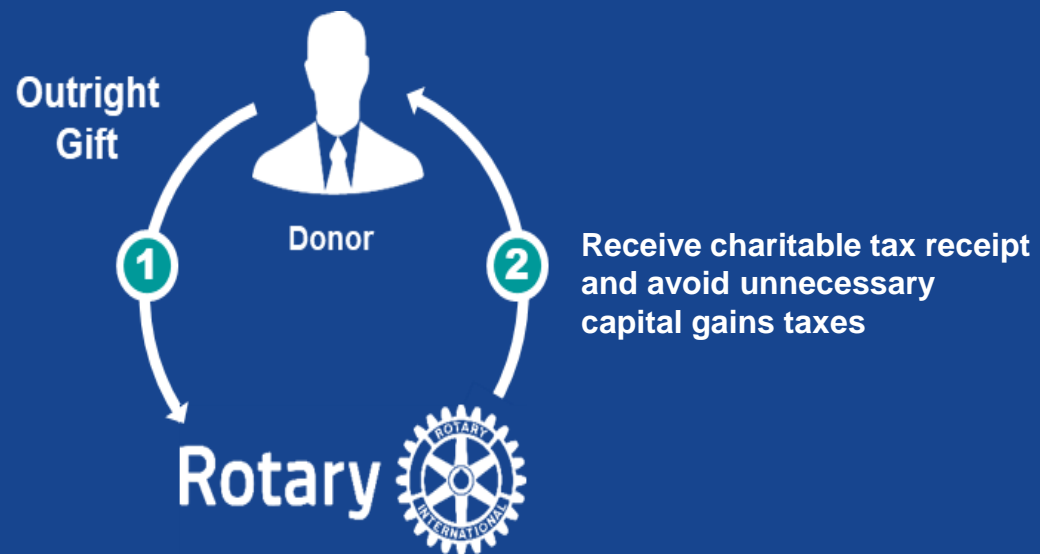
Retain flexibility in case your circumstances change



# GIFTS OF RETIREMENT ASSETS

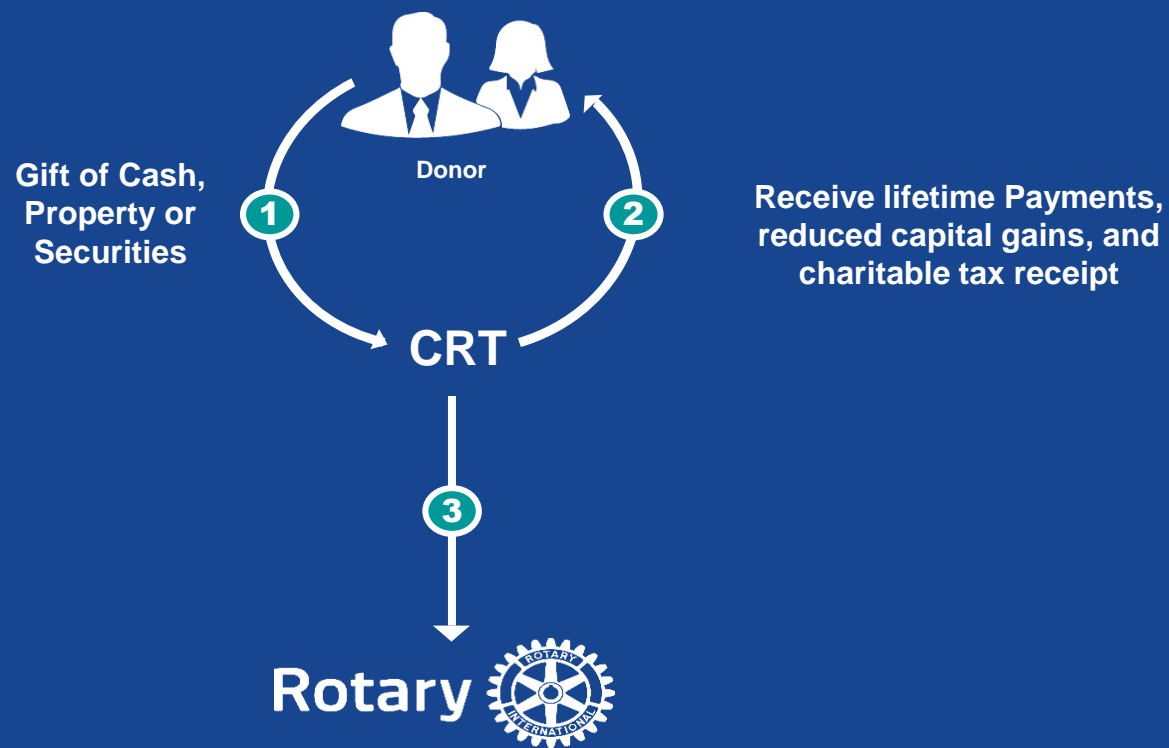


# GIFTS APPRECIATED SECURITIES

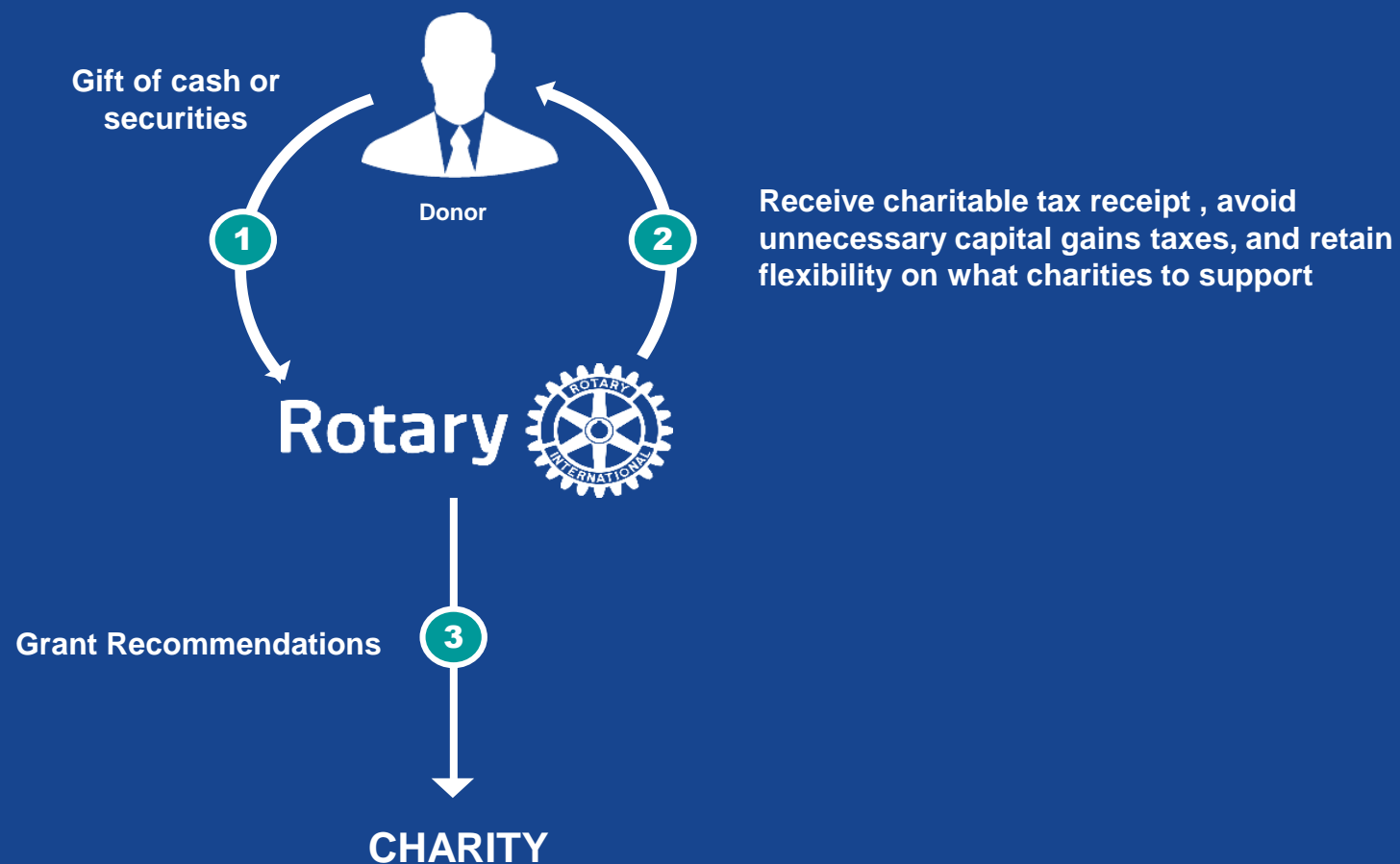




# CHARITABLE REMAINDER TRUST



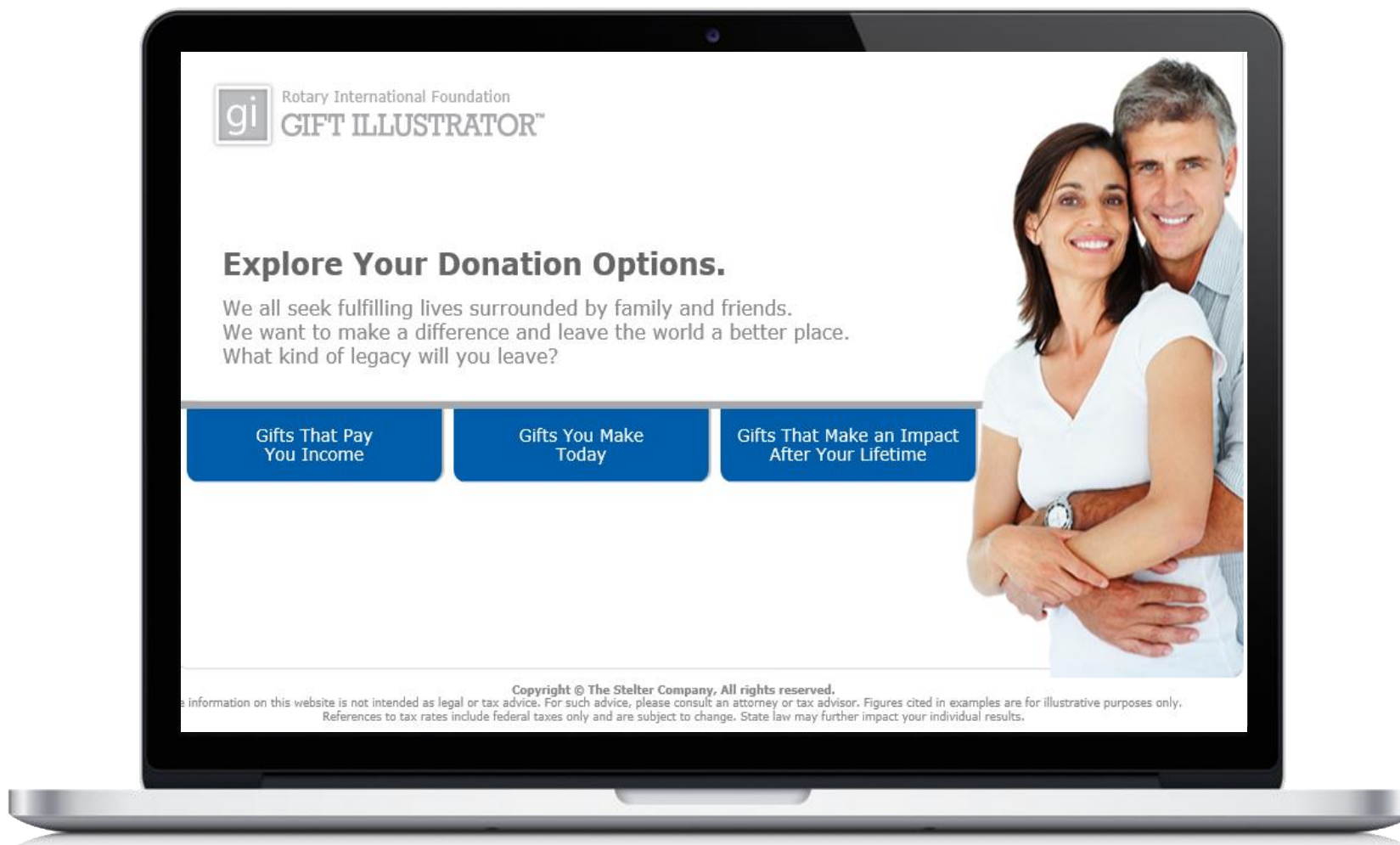
# DONOR ADVISED FUNDS



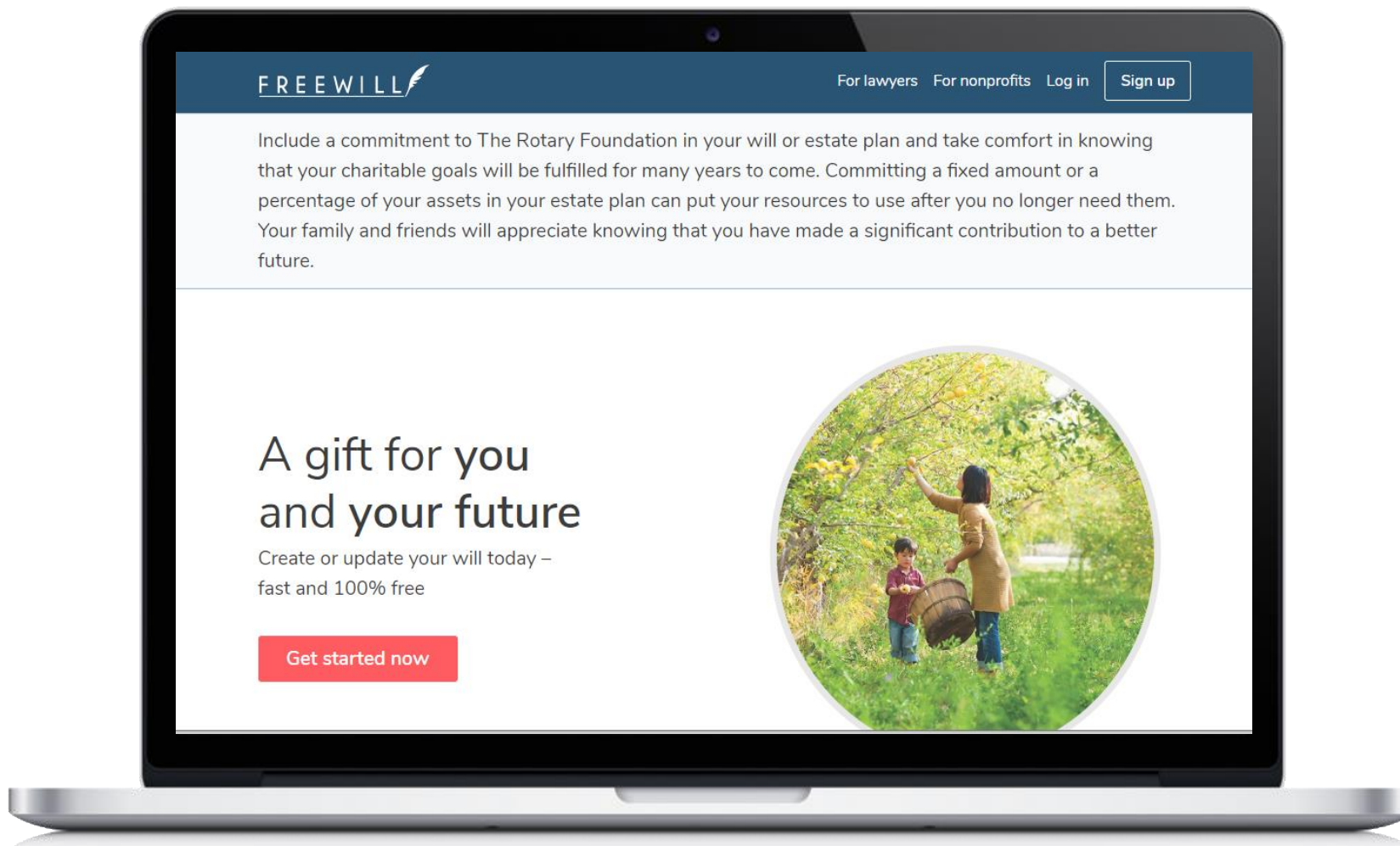
# GIFT PLANNING RESOURCES



# ROTARY.PLANMYGIFT.ORG



# FREEWILL.COM/THEROTARYFOUNDATION





# QUESTIONS

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