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

92% of funds are spent on program awards and operations.
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

$7.5 Million
2008

$15.5 Million
2019

$50 Million
2025
YOUR LEGACY, ROTARY’S PROMISE

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

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

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
GIFT PLANNING OPPORTUNITIES

- 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.

Bequest

Donor

Retain flexibility in case your circumstances change.

Rotary
GIFTS OF RETIREMENT ASSETS

Outright Gift

Donor

Avoid unnecessary income tax
GIFTS APPRECIATED SECURITIES

1. Outright Gift

2. Donor

Receive charitable tax receipt and avoid unnecessary capital gains taxes
CHARITABLE REMAINDER TRUST

Gift of Cash, Property or Securities

Donor

1

2

CRT

3

Receive lifetime Payments, reduced capital gains, and charitable tax receipt

Rotary
DONOR ADVISED FUNDS

Grant Recommendations

Gift of cash or securities
Donor

Receive charitable tax receipt, avoid unnecessary capital gains taxes, and retain flexibility on what charities to support

Rotary

CHARITY
Explore Your Donation Options.
We all seek fulfilling lives surrounded by family and friends. We want to make a difference and leave the world a better place. What kind of legacy will you leave?

- Gifts That Pay You Income
- Gifts You Make Today
- Gifts That Make an Impact After Your Lifetime
QUESTIONS

Tom Yuzer
t-yuze@umn.edu
(951) 805-4468

Beth Garrow
beth.garrow@rotary.org
(847) 866-3034

Erin Groble
erin.groble@rotary.org
(847) 424-5376