


YOUR LEGACY ROTARY'S PROMISE

The
Rotary
Foundation





**How will your
legacy change
the world?**

*He believed he would get better, but the medical clinic didn't have the resources to help him – **Rotary did.***

*They knew clean water could be captured from the spring year round, if only they had the engineering knowhow – **Rotary does.***

*She knew she could make a difference for others, if only someone believed in her enough to help with her education – **Rotary will.***

As People of Action, we come together to secure a future where health and hope will thrive.

You know first-hand that Rotarians take action to answer these quiet calls for help all around the world, every day. Connecting these voices to the right solution doesn't happen without tireless effort and valuable resources. Your annual gifts to The Rotary Foundation help people around the globe today. Your support of Rotary's Endowment will support the same life-changing programs forever.

**Let your voice be the one
that answers the call.**

Make an Impact Now and Forever

Whatever your passion in Rotary, the Endowment can help you support it forever – in your name or to honor a loved one.

Imagine the tremendous impact of your legacy after more than 100 years of investment!

Deciding to leave a lasting legacy with The Rotary Foundation involves many considerations and may take time. The easiest part is starting the journey, simply by saying yes.

“Yes, I want to help others like I have done for years with Rotary!”

Estate Planning Tool

Interest in securing financial plans is stronger than ever. Rotary has joined with FreeWill.com to answer this need. FreeWill.com is a trusted resource for Rotarians who are looking to legally document simple and intuitive estate plans. This service also allows users to record charitable wishes. There is no charge for the FreeWill tool and you can share your documents with your advisors. As always, estate planning attorneys and other financial professionals continue to be a trusted resource for wills and estate plans.

Click here: [Visit our custom page to find out more about how to protect your loved ones and the causes close to you.](#)



Knowing the importance of longevity, Past Rotary International President Arch Klumph encouraged Rotary to establish an Endowment in 1917. That fund is now providing resources for school books, scholarships, peace studies, medicine, training, and clean water every day.

Secure Your Vision



Include a commitment to The Rotary Foundation in your will or estate plan and take comfort in knowing that your charitable goals will keep providing for years to come.

We've shared a lot about how you can plan for a later gift, but you can also give now, taking advantage of all the benefits and preferences that a name fund in the Endowment offers.

Named Funds

By making a gift of \$25,000, Rotary will create a dedicated fund in your name. This fund can support your district through SHARE, just as your Annual Fund gifts do now. You may decide instead to provide unrestricted support through the World Fund or direct your gift to one of the areas that mean the most to you, such as: promoting peace, fighting disease, providing clean water and sanitation, saving mothers and children, supporting education, or growing local economies.

Imagine your district learning year after year that your legacy is providing valuable support for the Rotary activities that mean the most to you.



Make it count

Name Your Grant

If you are passionate about scholarships, humanitarian grants, or vocational training teams, you might opt for a named grant instead.

For a gift of \$150,000, Rotary can prepare an agreement to honor you every time a scholar or training team is selected and sent in your name.

Imagine a student's amazement when they discover they are able to learn in their area of study thanks to an individual who had the foresight to establish a fund 10, 25, or even 50 years earlier.

For those who want even greater specificity, gifts of \$250,000 or \$500,000, allow for the selection of two or three personalizations respectively:

Specific Activity

- humanitarian projects
- scholarships
- vocational training

Specific Rotary Cause

Specific District

Specific Geographic Location

(such as Africa, Asia, or Latin America)

**As they study in your name,
your legacy will live on.**

Take Action



From front to back: Kay Resler, Judy Wolf and Allan Telford plant flowers while providing help and hope for families at The Yolo Crisis Nursery. All three are leaders of the Rotary Club of Davis, CA. Photo by Fred Gladdis. Davis Enterprise Newspaper, Yolo County News.

KAY RESLER, ROTARY CLUB OF DAVIS, CA

Kay Resler has generously supported Rotary with her time and talent over the years, including serving as Club President. As part of a Global Grant team, she traveled to Kenya and provided education and training on the dangers of shaken baby syndrome. This trip helped inspire her to include The Rotary Foundation in her estate plan to ensure that Rotary will always have the resources needed to help communities worldwide.

"I'm just an ordinary person," Kay shares. "And I feel good knowing that, through my eventual gift to The Foundation, I will leave a legacy that helps make the world a better place."

"I know that The Foundation has a proven track record, so who better to entrust with carrying out my wishes than an organization I truly believe in?"

- Kay Resler

The Rotary Foundation Trustees are pleased to offer membership in special societies when you make an outright gift or a commitment to the Endowment.

Legacy Society

membership is provided to those who have substantiated a future gift of \$1 million or more to the Endowment.

Arch Klumph Society

membership is reserved for those who provide \$250,000 or more outright or through cumulative qualifying gifts.

Major Donor

recognition is awarded to those who have given \$10,000 or more outright.

Bequest Society

membership is provided to those who have committed \$10,000 or more in financial support.

Please let us know if you'd like to discuss Your Rotary Legacy with a member of the Planned Giving team and remember that www.freewill.com/therotaryfoundation is available to you if you're ready to start planning.

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The legacy giving information in this publication is provided for general information purposes only. It is not intended as a substitute for professional advice and assistance from your lawyer, financial advisor, or tax consultant. We recommend that you discuss your plans with your lawyer and/or financial advisor before proceeding with a legacy gift.