



# ROTARY'S ENDOWMENT: THE SECRET TO YOUR SUCCESS



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# IMMEDIATE IMPACT

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Annual gifts to help people live better  
lives today.



**FUNDRAISING**





# LONG-TERM IMPACT

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

*Building*

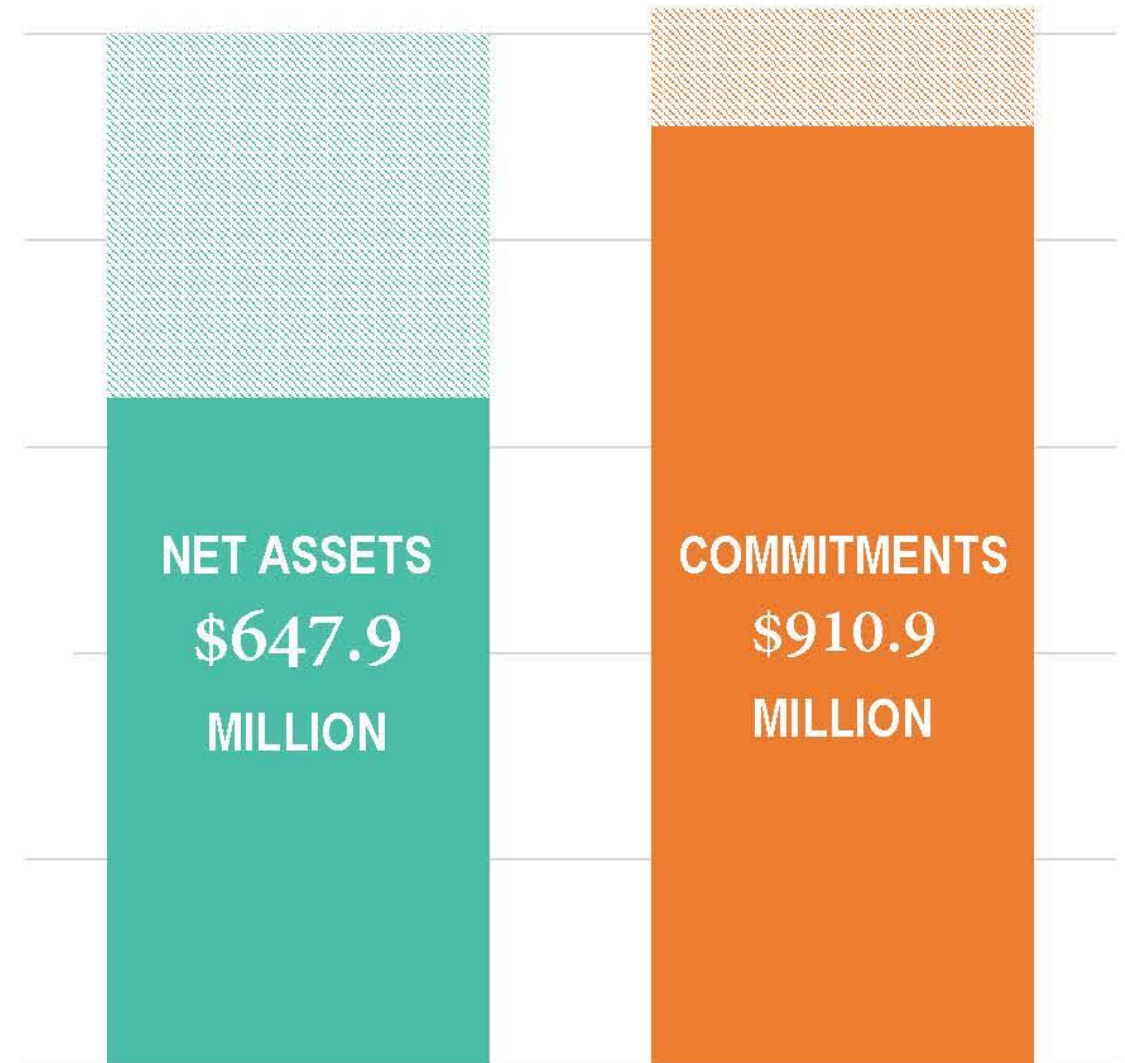
The Rotary Foundation  
**ENDOWMENT**

*2025 by 2025*

Current combined total= \$1.559 billion

Remainder to goal= \$466.2 million

Goal **\$1billion** + **\$1.025 billion** =  
\$2.025 billion



- Unaudited -

Net Assets as of 28 February 2022 and Commitments as of 30 April 2022



# LEGACY GIFTS

# Types of Planned Gifts

Bequest

Outright

Charitable Gift Annuity

Charitable Remainder Trust

Donor Advised Fund

**Real  
estate**



Proceeds from  
investment  
account

Sale of a  
business

a home

**Life  
insurance**

\$\$ from IRAs

Publicly traded  
securities

Will or Living trust

# QUESTIONS





# COMMITMENTS

**Documented promises of future gifts**

## **Traits:**

Revocable

Low to no immediate cost

Rotary Recognition Available

Lower stress

# Identifying Prospects

- Reports to get you started
- Know your donor
- Start a relationship
- Talk one on one with the prospect
- Ask what they are passionate about
- Tailor each conversation to their interests



# TIPS FOR BEQUEST CONVERSATIONS

1. Ask if they've included Rotary in their will
2. Don't mention death
3. Benefits of including Rotary in will – support Rotary forever
4. Bequests make life easier for the family
5. Use social proof – examples of someone they know or data
6. Easy way to give – no cash involved, revocable
7. Resources to create a will – FreeWill

# HOW TO USE FREEWILL

You've been there for your family and community — now let Rotary be there for you.

To help you provide for the people and causes you hold dear, use Rotary's free online tool to write your legal will and protect your loved ones.

**Get started at**  
**[FreeWill.com/TheRotaryFoundation](https://FreeWill.com/TheRotaryFoundation)**

***For more information:***

**CALL**

**847-866-3166**

**EMAIL**

**[Rebecca.Tanaka@rotary.org](mailto:Rebecca.Tanaka@rotary.org)**



# PROBATE IN TEXAS

- Surety Bond – protects the interest of the estate & heirs
- Attorney fees
- Filing fees
- Court costs
- Personal Representative compensation – 5% of estate is common
- Various other professional fees – CPA, etc.

# RECOGNITION: BENEFACTOR, BEQUEST SOCIETY, LEGACY SOCIETY

- **Benefactor:** \$1,000 commitment or gift to TRF Endowment
- **Bequest Society:** commitment to TRF Endowment at the below minimum 1-time or cumulative amounts  
\$10,000 \$25,000 \$50,000 \$100,000 \$250,000 \$500,000
- **Legacy Society:** commitment and a copy of the beneficiary pages from their will, trust, life insurance policy, IRA, or other type of account showing TRF as beneficiary of \$1M or more



# QUESTION TO START A BEQUEST CONVERSATION

“What would the world look like if you could do one thing to make it a better place?”

Listen carefully

Follow-up: “Have you ever thought about including Rotary in your will? That’s a great place to start making your dream a reality.”

# IT'S YOUR TURN: PRACTICE DONOR CONVERSATIONS

- Review tips on the handout
- Choose a partner
- Have a conversation about remembering Rotary in their estate plans
- Switch roles and have another conversation
- Be prepared to answer these questions:
  1. What was comfortable for you?
  2. What was uncomfortable for you?

# ROTARY'S PROMISE CLUB

## CRITERIA



The Rotary Foundation recognizes the Rotary Club of

**San Beeny**

as a

**Rotary's Promise Club**

Your support of The Rotary Foundation Endowment will save lives and enrich communities into the next century and beyond.

**Your Legacy, Rotary's Promise**

  
K.R. Ravindran  
Chair, The Rotary Foundation Trustees

  
Holger Knaack  
President, Rotary International

2020-21

- All active members have a \$1,000+ gift or commitment to The Rotary Foundation Endowment.
- New and prior gifts and commitments count.
- District Governor emails [planned.giving@rotary.org](mailto:planned.giving@rotary.org) and asks that Club Name and Number be certified as a Rotary's Promise Club.
- TRF staff check reports to verify the request
- Assuming 100% of all active members of that club qualify, a certificate will be emailed to the club



# OUTRIGHT GIFTS to the Endowment

## Gifts made during life:

**Directed Gifts - \$15,000 or more**

**Named Endowed Fund Gifts - \$25,000 or more**

## Traits:

Irrevocable

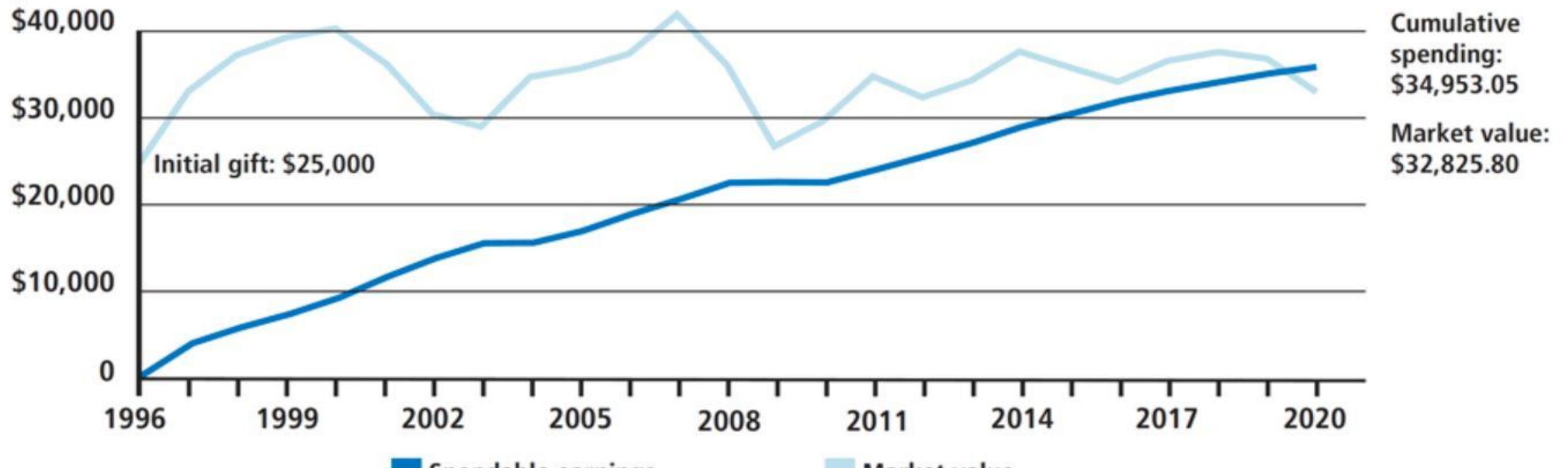
Donor can see impact

Immediate Rotary recognition

# NAMED ENDOWED FUND GROWTH CHART

A named endowed fund of \$25,000 established in 1996 has provided spendable earnings since then of more than \$34,000. In addition, the fair market value of the fund has grown to almost \$33,000.

See how an Endowment contribution grows over time and continues to give.



# IRA TRANSFERS

- Age: 70-1/2 or older - QCD
- Yearly tax free limit: \$100K per person/\$200K per married couple
- Age: 72-1/2 or older – RMD
- Pay no income tax when transferring money out of an IRA
- No charitable tax receipt or tax deduction
- No Rotary forms to use



# NEW IRA TRANSFER PROCESS

- Use your IRA provider's forms to request a direct transfer from your IRA
- Ensure that your name, Rotary ID, and Rotary Program you support are written on the check or memo
- IRA transfers automatically benefit AF SHARE if no other designation is indicated
- If your IRA account has a checkbook:
  - make it payable to The Rotary Foundation
  - write your name, Rotary ID, and designation on the check
  - mail checks to Rotary at: 14280 Collections Center Drive, Chicago IL 60693

# 2 KINDS OF LIFE INCOME GIFTS AT ROTARY

Make a gift to TRF Endowment today...receive payments for life

## Charitable Gift Annuity

Minimum age: 50  
Minimum amount: \$10,000  
Assets to use: cash stock  
Payment rates: 3.8% to  
9.1% based on age at  
time of gift

## Charitable Remainder Trust

Minimum age: 50  
Minimum amount: \$100,000  
Assets to use: cash, stock,  
real estate  
Payment rates: 5.0% to 7.0%

# CHARITABLE GIFT ANNUITY

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## Benefits to Donor:

- fixed payments backed by TRF's unrestricted assets
- new higher rates from July 1, 2022
- hedge against inflation
- spread tax deduction over 5 years
- spread capital gains tax over the donor's life
- Major Donor or AKS recognition when the gift is made
- remainder supports 1 or more Rotary causes after donor's life

# CHARITABLE REMAINDER TRUST

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## Benefits to Donor:

- fluctuating payments for life based on market and endowment performance
- add \$ to the CRT after establishing
- spread tax deduction over 5 years
- by putting stock or real estate into the trust, eliminate capital gains tax
- Major Donor or AKS recognition when the gift is made
- remainder in trust supports 1 or more Rotary causes after donor's life

# ROTARY CAUSES

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Providing Clean Water

Supporting Education

Fighting Disease

Saving Mothers and Children

Growing Local Economies

Supporting the Environment

Promoting Peace

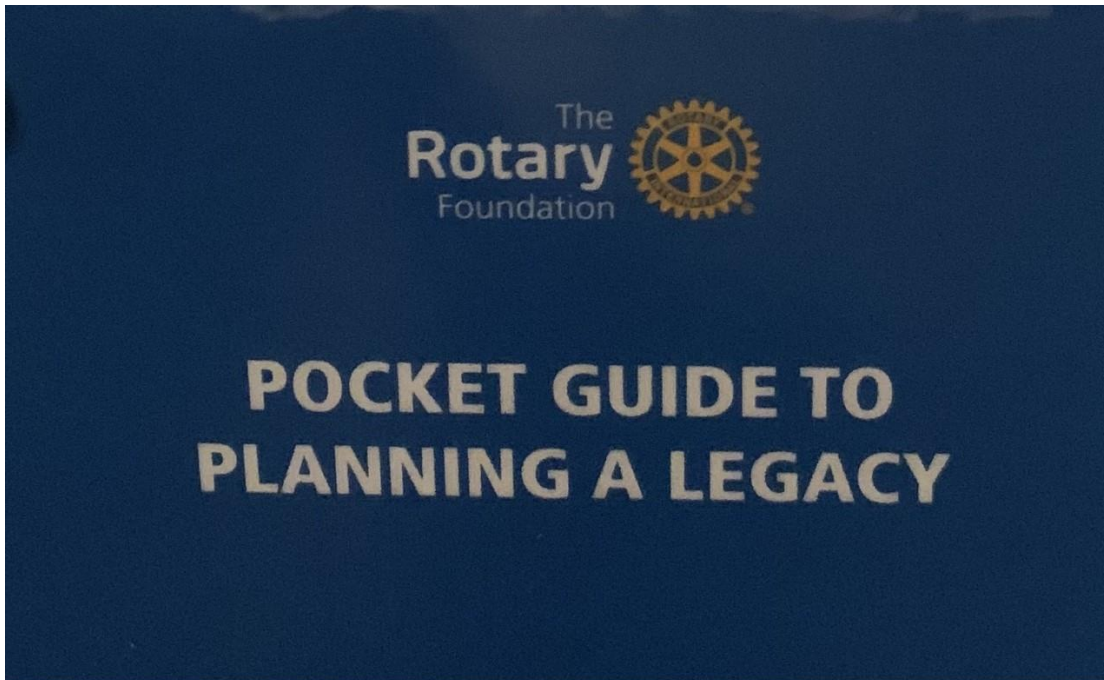
Awarding Scholarships

Deploying Vocational Training Teams





# Pocket Guides and District Website



## Page Topic

1	The Strength of Rotary
2	Rotary's Mission
3	What is TRF Endowment
4	Gift Types
5-6	How to Include Rotary in Your Estate Plan
7	Named Endowed Funds
8-9	Recognition: Outright Gifts & Estate Gifts
10	Why People Want to Give
11	Contacts
12	Life Income Agreements
13-14	Additional Gift Types
15	Donor Advised Funds
16	Individual Retirement Accounts

# QUESTIONS





# HOW WILL YOU CHANGE THE WORLD?

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