The bequest will be funded by

___ Will or Living trust

___ Charitable remainder trust

___ Retirement plan/IRA/401(k)

___ Life insurance

___ Donor advised fund

___ Other _____

The amount to The Rotary Foundation will be

_____% or US$ _____
(The anticipated amount is necessary to determine recognition.)

Note: _____

_____

_____

_____
Signature   Date

_____
Signature   Date

Remember to consult independent tax and/or legal advisers before making any charitable gift.

Return this form and any supporting documents you wish to share to:

    The Rotary Foundation (FN110)
    1560 Sherman Avenue
    Evanston, IL 60201-3698, USA

You may also complete this form online at **www.rotary.org/bequest**.

If you would like to know more about giving options, please consult with your district Rotary Foundation chair, or you may email us at **planned.giving@rotary.org** or call 847-866-3100.

Recognizing your generosity

When you have completed your estate plan, please let Rotary know so we may properly thank you.

Rotary is pleased to confer **Benefactor** status on those who commit any amount in their estate plan to the Endowment Fund. Benefactors receive personalized certificates and a special insignia to wear with their Rotary pins. Those who commit to gifts of US$10,000 or more receive membership in the **Bequest Society**, which provides special Foundation updates and invitations, and an exclusive pin and engraved crystal.

Bequest Society Recognition Levels (in U.S. dollars)

1 – $10,000	4 – $100,000*	6 – $500,000*+
2 – $25,000*	5 – $250,000*+	7 – $1,000,000*+
3 – $50,000*		

*Qualifies for a customized named fund

+Qualifies for posthumous Arch C. Klumph Society membership

The details of your commitment remain confidential; however, we may share that you are one of the growing number of Rotarians and friends providing future gifts to the Foundation. You may just inspire someone else!

❖   ❖   ❖

What you do today will determine what Rotary can do tomorrow. Make a difference and start your personal legacy by making a gift to The Rotary Foundation in your estate plan.

We support Rotary because of its effectiveness in making the world a better place — Rotarians working together to improve the lives of others at the local level all around the world.

It was so simple to include The Rotary Foundation's Endowment Fund when we did our estate plans. We are happy that through our bequests we will continue to improve the lives of others even after we're no longer on this earth. How could we not act now to better the lives of others for years to come?
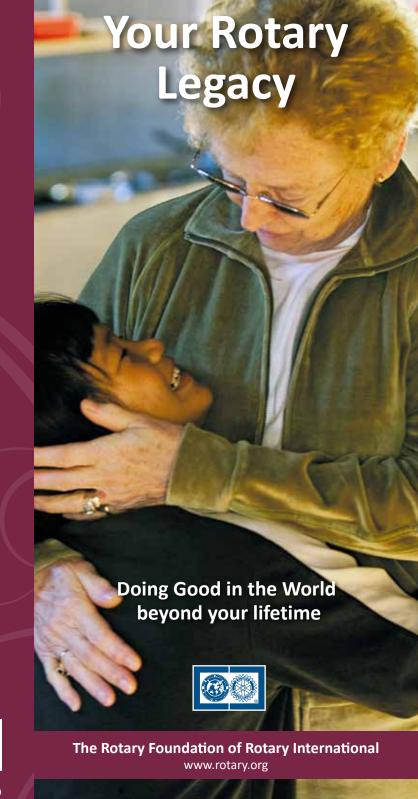
— PDG Pamela S. Akins
Barry A. Levinson
RC of New London,
Connecticut, USA
District 7980

ROTARY INTERNATIONAL®

One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
www.rotary.org

Your Rotary Legacy

Doing Good in the World beyond your lifetime

The Rotary Foundation of Rotary International
www.rotary.org

Rotary's tomorrow depends on what we do today.

Promote a better world beyond your lifetime by including The Rotary Foundation's Endowment Fund (formerly the Permanent Fund) in your estate plan. The principal of a gift to the Endowment Fund is never spent, so a portion of the earnings will always be available for Foundation programs. We invite you to join those who have already committed to improve and enrich the lives of people around the globe through a gift to the Endowment Fund.

The Rotary Foundation is known for its commitment to effective programs that make a real difference in people's lives. A gift from your estate to the Endowment Fund can provide ongoing financial support for one or more Rotary service areas, as if you were continuing to make annual contributions in perpetuity.

How to include the Foundation

You can include Rotary in your estate plans in many ways — most commonly by making a gift in a will or adding to a will by a document known as a codicil. Alternatively, you might choose to make Rotary the beneficiary of a retirement plan or insurance policy. In most cases, your gift should be directed to "The Rotary Foundation of Rotary International." Canadians may use "The Rotary Foundation Canada."

Here are a few examples of language for your adviser to consider:

❖ For a general gift of a certain percentage or portion of the estate: "I give to The Rotary Foundation of Rotary International one-fourth of my property."

❖ For a gift of a specific asset: "I give 500 shares of XYZ stock to The Rotary Foundation of Rotary International."

❖ For a contingent bequest, which takes effect only upon the meeting of certain conditions: "In the event my spouse does not survive me, I give to The Rotary Foundation of Rotary International XYZ amount."

❖ For a residual bequest, which directs all or a portion of whatever remains after all other required amounts are paid: "I give the rest, residue, and remainder of my estate to The Rotary Foundation of Rotary International."

How Rotary programs benefit

Undesignated gifts provide support through the World Fund for Foundation programs with the greatest need. Alternatively, your Rotary district may help direct a portion of the spending from your bequest if you select the SHARE designation. You may also support a specific area of focus. The detachable response card lists the most common options.

Naming your fund

You may be able to personalize your legacy through a named fund within the Endowment Fund. The separately identified fund could bear your name, your family's name, or the name of a loved one. The Foundation will work with you and your advisers to prepare a customized testamentary gift agreement memorializing your intent. The minimum amount to establish a fund is US$25,000.

Yes, I/we have made a commitment to The Rotary Foundation in my estate plan.

Name(s) as you would like to appear on recognition
☐ Please do not send an engraved crystal

Address

City, state or province, country, and postal code

Rotary club

Optional:

District   Rotary ID #

Date(s) of birth

Home, business, and/or mobile phone

Email

I/we designate that the spending portion of the gift to the Endowment Fund will be applied

☐ at the Trustees' discretion (World Fund)
☐ through SHARE (World Fund and District Designated Fund)
☐ to the Rotary Peace Centers
☐ to an area of focus:

___ Peace and conflict prevention/resolution
___ Disease prevention and treatment
___ Water and sanitation
___ Maternal and child health
___ Basic education and literacy
___ Economic and community development