Your Rotary Legacy

Yes, I/we have made a commitment to The Rotary Foundation Endowment.

Name(s) to appear on recognition materials and/or for future publication.

Address

City, state or province, country, and postal code

Email

Optional:

Rotary ID # Rotary club name

Rotary district

Date(s) of birth

Home, business, and/or mobile phone

The details and amount of your commitment will always remain confidential. Rotary may share your name unless you request anonymity.

The spending portion of the gift shall be:

- ☐ Unrestricted (World Fund)
- ☐ Directed to:
  - ○ SHARE (World Fund and District Designated Fund)
  - ○ Rotary Peace Centers
  - ○ One or more areas of focus:
    - ☐ Peacebuilding and conflict prevention
    - ☐ Disease prevention and treatment
    - ☐ Water, sanitation, and hygiene
    - ☐ Maternal and child health
    - ☐ Basic education and literacy
    - ☐ Community economic development
    - ☐ Environment

☐ Please contact me at the phone number above to discuss gift designation preferences.

The bequest will be funded by (some gift options are not available in all regions):

- ☐ Will or living trust
- ☐ Retirement plan beneficiary designation
- ☐ Life insurance beneficiary designation
- ☐ Donor advised fund
- ☐ Charitable remainder trust
- ☐ Other (please describe) _____

The gift to The Rotary Foundation is expected to be:

US$ _____

(The dollar amount is used for recognition purposes; if no amount is selected we will default to Level One.)

Recognition options:

For those who commit $10,000 or more, one recognition pin per person will be automatically shipped to a home address.

My/our recognition preferences are noted below:

- ☐ I/we *do not* wish to receive an engraved crystal. (for commitments of $25,000 or more).
- ☐ I/we *would* like a pendant with the pin(s).
- ☐ Tell me more about special naming opportunities.
- ☐ Send all recognition materials to this address instead:

_____

_____

_____

- ☐ I/we have another request. (Please describe)

_____

_____

_____

Signature Date

Signature Date

Please return this form and any supporting documents you wish to share that name Rotary as beneficiary. Contact information for your nearest Rotary office is featured on the reverse.

The Rotary Foundation

rotary.org/legacy

How to include Rotary in your estate plan

One of the most popular ways to include Rotary in an estate plan is through a will or codicil. Whichever method works best for you, please remember to use the official legal name, **The Rotary Foundation of Rotary International**, unless one of the following names applies in the region where you live:

- The Rotary Foundation (Canada)
- Rotary Foundation (India)
- Public Interest Incorporated Foundation — Rotary Foundation Japan
- Rotary Foundation of the United Kingdom

Let Rotary recognize you

Once you have included Rotary in your estate plans, please complete this form and mail it to your closest Rotary office or submit notification of your gift at **rotary.org/legacy** so that we may properly thank you and recognize your generosity.

Individuals and couples who have substantiated a future gift of $1 million or more to the Endowment are listed in Rotary's annual report and are invited to exclusive Rotary International and Foundation events. **Legacy Society** members also receive special recognition items and all the benefits provided to Bequest Society members.

Those who have made commitments for future gifts of $10,000 to The Rotary Foundation are invited to join the **Bequest Society**. Each level of giving includes the benefits offered to Bequest Society members at the preceding levels.

- $500,000 Special seating and registration benefits at the Rotary International Convention
- $250,000 Posthumous induction into the Arch Klumph Society
- $100,000 Customized Rotary's Promise crystal
- $50,000 Separate named endowed funds directed to two areas of focus or districts
- $25,000 Rotary's Promise crystal and named endowed fund
- $10,000 Bequest Society pin and an exclusive art piece suitable for framing
- $1,000 Benefactor designation (via outright gift or commitment to the Endowment)

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