

# Your Legacy, Rotary's Promise

## Endowment Naming Opportunities

Create a lasting legacy now — in your name or to honor a loved one — to see the impact of your gift and watch it grow over time. Make a commitment in your estate plans to support the causes you care about most forever. Your fund is tracked and reported to you and to your district so they are reminded of your generosity for generations to come.



### Customized Global Grant Endowed Fund

An endowed fund customized with up to **three** of the following options for a minimum gift of **\$500,000** or up to **two** for a minimum gift of **\$250,000**:

- **Activity** (humanitarian project, scholarship, or vocation training team)
- **Rotary Causes** (listed below)
- **District**
- **Geographic location** (such as Africa, Asia, or Latin America)

FOR EXAMPLE: *The John and Jane Smith Humanitarian Endowed Fund for Maternal and Child Health* provides John and Jane's home district in California with funding for humanitarian grants that enhance maternal and child health anywhere in the world.



### Activity Global Grant Endowed Fund

An endowed fund that supports **one** of the following global grant types for a minimum gift of **\$150,000**:

- **Humanitarian projects**
- **Scholarships**
- **Vocational training teams**

FOR EXAMPLE: *The John and Jane Smith Endowed Scholarship* supports scholarships for graduate studies sponsored by any district for study anywhere in the world.



### Named Endowed Fund

An endowed fund that supports your district through SHARE or provides general support to the World Fund, Rotary Peace Centers, or one of Rotary's causes (listed below) in your name for a minimum gift of **\$25,000**:

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



# Endowment Gift Designations

The principal of a contribution to the Endowment is never spent, but a portion of the earnings is made available annually for specific program activities. A commitment or gift of any amount can be restricted in Rotary's Endowment to provide support as described:

## World Fund

The World Fund is spent at the discretion of the Foundation's Board of Trustees wherever the need is greatest around the world. World Fund spending provides an opportunity for every district to participate in the Foundation's programs. Per Trustee policy, this is the default designation for undesignated gifts to Rotary of \$10,000 or more.

## SHARE

Gifts designated to SHARE are currently split equally between the World Fund (defined above) and District Designated Funds. The Rotary district of your choice uses District Designated Funds to participate in the Foundation's programs to improve the communities locally and around the world.

## General Support

The spending portion of gifts designated to a Rotary cause will provide general support to one or more of the following six causes of your choice:

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

## Rotary Peace Centers

Gifts to the Rotary Peace Centers provide general support for the Foundation's partnership with leading universities around the world to train professionals in conflict resolution, peace studies, international relations, and other related disciplines.

We are grateful to the devoted friends, leaders, and problem solvers whose generosity provides perpetual support for the Foundation. If you have included The Rotary Foundation in your Will or other estate plan, please complete and return the **Your Rotary Legacy** card so we may express our gratitude with benefactor or Bequest Society recognition.

**Thank you for considering a gift or commitment that will help us provide health, hope, and opportunity to people around the world for years to come.**

All monetary amounts in this document are in US dollars. Please note that only a portion of the annual earnings are used for program spending. The Endowment Fund Financial Report provides additional information. All funds must be approved by The Rotary Foundation.