

NURTURE YOUR ROTARY DREAM

“I was pleased to learn I could use my unneeded IRA assets to support my favorite Rotary projects. The transfer process was very simple and was able to make a lasting global impact.”

**– RICHARD A. RAY
ROTARY CLUB OF QUAIL
POINT (MEDFORD), OR**

To learn more, call The Rotary Foundation at (847) 866-3100.



NURTURE YOUR ROTARY DREAM **NOW**

Provisions in the Emergency Economic Stabilization Act of 2008 may provide a better way to make charitable gifts until 31 December 2009. The legislation allows the direct transfer of any amount up to \$100,000 per year from an Individual Retirement Account to The Rotary Foundation without triggering federal income tax.

Consider a Charitable IRA Rollover if:

- You are at least age 70½
- You would like to support The Rotary Foundation in a tax-efficient manner
- You do not need income distributions from your IRA
- You want to use unneeded assets to secure a Rotary legacy with the gift of a lifetime

Please return to The Rotary Foundation Planned Giving Team
1560 Sherman Ave., FN110, Evanston, IL 60201-3698

- I want to **Nurture My Rotary Dream NOW!**
Please send me transmittal instructions.
- I want to **Nurture My Rotary Dream in the FUTURE!**
Please send me information about remembering The Rotary Foundation in my estate plan.
- I have plans in place to **Nurture My Rotary Dream.**
Please contact me to discuss.

NAME(S): _____

ADDRESS: _____

CITY: _____ ST: _____ ZIP: _____

PHONE/E-MAIL (OPTIONAL): _____

NURTURE YOUR ROTARY DREAM IN THE **FUTURE**

Consider the best options when planning your meaningful bequests to loved ones and The Rotary Foundation. IRAs, 401(k)s and other qualified plans are often well suited for charitable contributions from an individual's estate, while remembering loved ones with other assets.

Create a better future with your retirement assets

Make The Rotary Foundation a beneficiary of your retirement plan to deliver health, education and peace through Rotary for generations. Your retirement plan administrator can provide the proper forms to help your estate benefit from possible tax advantages while you create a lasting legacy.

CONTACT US TO LEARN MORE!

The Rotary Foundation staff is ready to provide information about using retirement assets for charitable gifts, as well as easy-to-use forms to facilitate a Charitable IRA Rollover. To learn more about this type of giving or other ways to achieve your charitable and financial goals, please contact us.

We appreciate the difference your gift will make!

It would be our pleasure to recognize your generosity as a Major Donor, Bequest Society member or Benefactor. Contact us to see if you qualify!

(847) 866-3100

PLANNEDGIVING@ROTARY.ORG