

THE ROTARY FOUNDATION CHARITABLE GIFT ANNUITY

A US tax deduction and payments for life for himself and his spouse

A world free from disease



The ability to read and write

Peace

Whose future would you like to help secure?

- Self and/or spouse
- The Rotary Foundation
 - Health & hunger
 - Education
 - Peace
- Rotary District # _____
- _____
- All of the above

Contact
The Rotary Foundation for ideas on achieving your personal, financial and charitable goals.

CGA payment rates benefit You and The Rotary Foundation!

The gift annuity rates are calculated to provide **attractive payments to the donor** and/or other annuitant(s) and also to result in a **significant portion of the contribution remaining for The Rotary Foundation.**

The annuity payments are a percentage of the value of the original gift and are based on age. Please see below for sample rates available for a single-life annuity and call (847) 866-3833 for customized rates.

Age 60	4.8%
Age 70	5.8%
Age 80	7.5%

Your charitable gift annuity is a mutual relationship with The Rotary Foundation.

When you contribute cash or appreciated securities to fund an annuity, The Rotary Foundation agrees to pay an annual fixed amount for the lifetime(s) of up to two annuitants. Your personal legacy is solidified when The Rotary Foundation's Permanent Fund becomes the ultimate beneficiary of your generosity.

Can your gift pass the "The Four-Win Test"?

1. Make the gift of a lifetime now to support your favorite Rotary programs
2. Receive fixed payments for life
3. Achieve Major Donor status
4. Benefit from possible tax advantages

A charitable gift annuity may make your significant gift possible!

Contact Peter Doetschman, Planned Giving Officer, today at (847) 866-3833 or Peter.Doetschman@rotary.org.



The Rotary Foundation of Rotary International

Please complete and return to Peter Doetschman, Planned Giving Officer
1560 Sherman Ave., FN110, Evanston, IL 60201-3698

Please send me an illustration of possible benefits of a charitable gift annuity based upon the following birth dates: _____/_____/_____ (self) and _____/_____/_____ (spouse)
Month Day Year Month Day Year

\$10,000 \$50,000 \$100,000 Other amount \$ _____

I have included I would consider including The Rotary Foundation in my estate plans

Name(s) _____

Address _____

City _____ State _____ ZIP _____

Optional Information

Telephone _____

E-mail _____

Rotary Club _____ District # _____

Comments _____

Recommend a friend to receive CGA information _____



Past District Governor Holly Axtell and her husband, Keith, of the Rotary Club of Marin Evening, Marin, Calif., are both hard-working Rotarians that wanted to support the great humanitarian work of Rotary. However, **they were concerned about giving away too much of their retirement funds. A charitable gift annuity with The Rotary Foundation provided the answer.** The couple established Charitable Gift Annuities in 1998 and 2000, during their working years, and deferred their payments until 2011 and 2013.

“The Charitable Gift Annuity program is a win-win for everyone,” Holly said. “It allowed us to contribute to The Rotary Foundation, get significant charitable tax deductions when we needed them and know that we will receive fixed, quarterly payments for life to supplement our retirement funds when we get older.” The deferral period allowed for increased tax deductions in the years of the gifts and higher payments in their retirement years.

The Axtells are so proud to be Major Donors to The Rotary Foundation. “At every international conference and in our District, we get invited to special events as Major Donors. **What a great way to support the wonderful work of Rotary and get to enjoy the benefits while we are still alive!**”



With
fixed payments
for life and attractive
tax benefits,
an agreement
during your lifetime becomes a
generous donation
to The Rotary Foundation
that benefits
future generations.

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peter.doetschman@rotary.org