



Permanent Fund Donors

- Have a real commitment to Rotary
- Want to make a positive difference now and for future generations





Family Philanthropy

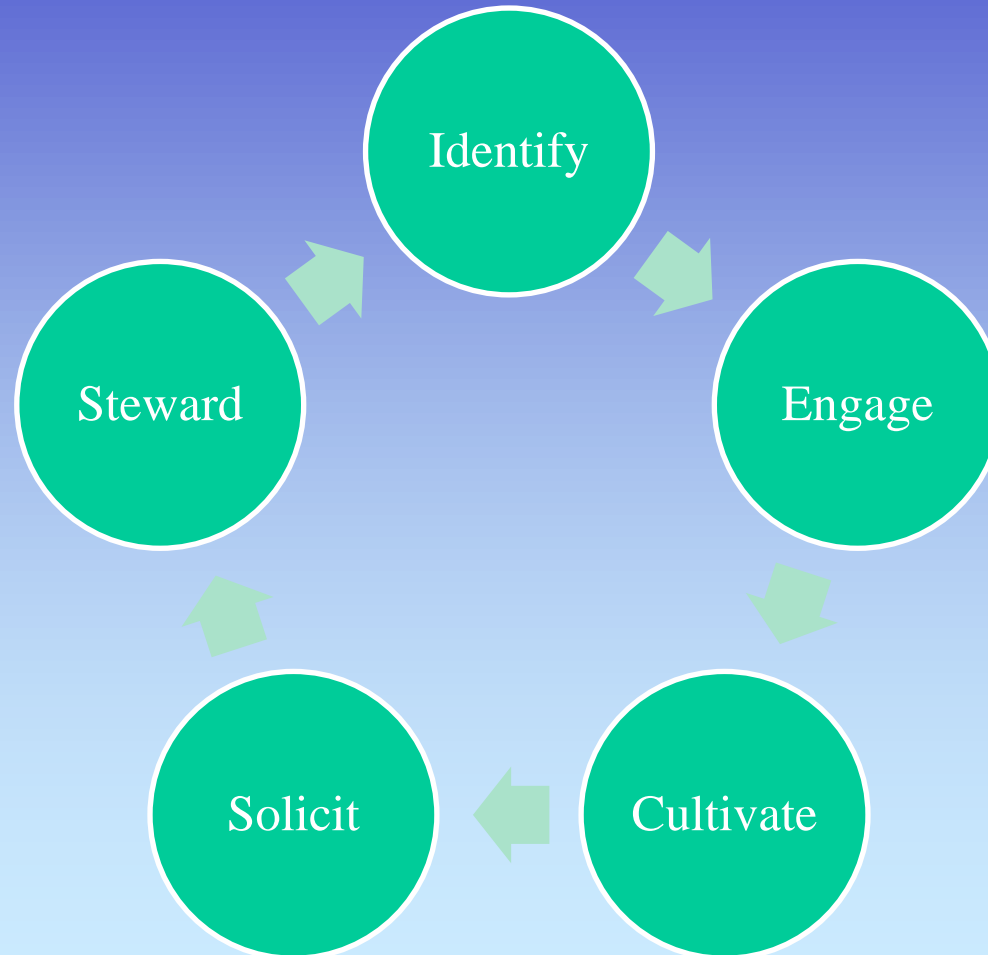
Philanthropy is a trait many of us want to teach each children and grandchildren.

Rotary's Permanent Fund can help demonstrate this to the next generation.





The Gift Process





Identify Donors

- Spend your efforts on the people who can make a difference
- Rotary Leaders
- Long-time donors
- Donors to other community projects
- People without children or with very successful children
- Look for “The Millionaire Next Door”





Engage

- Use Rotary Club meetings to share TRF message
- If you were a prospective donor, would you give the same gift if you weren't engaged?
- Put your best donors on your committee
- Find ways to make the experience more personal





Discuss Leaving a Legacy Gift to Rotary at a Club or District Meeting

- ❑ Would you like to continue to support the good works of The Rotary Foundation beyond your lifetime?





Leaving a Legacy

- ❑ Consider endowing your annual gift to The Rotary Foundation in perpetuity.





Leaving a Legacy

Would you like to
fund a specific
area of focus
in perpetuity?





Leaving a Legacy

- ❑ You may endow a specific area of focus in your name or the name of someone you would like to honor.





Leaving a Legacy



- ❑ Would you like to establish a new Foundation program?





So you have some prospects, now what: Cultivation

- One on one chats and phone calls
- Visions subscription
- Mail relevant information – letters
- Invite to receptions
- Invite to Alumni events
- Host a scholar or a GSE team member
- Hold estate planning seminar
- Use ongoing District events





Solicit

- Make an appointment to visit the person(s)
- It's a successful visit if
 - You strengthened the connection
 - You got new information that builds on strategy
 - You identified/set up next step
 - You secured an outright gift or a bequest commitment





Solicit

There are essentially three responses that you will encounter from a prospect:

- “No”
- “Not now, but”
- “Yes”





Know Rotary's Gift Types

- Publicly traded securities
 - ◆ Appreciated stocks
 - ◆ Mutual funds
- Marketable real estate (residential & commercial)
- Tangible personal property (jewelry/art, collectibles)
- Cash (... or by credit card for mileage points!)





IRA Roll-over Option

- Individuals who are 70 ½ at the time of the gift may annually donate up to \$100,000 from their individual Retirement Account (IRA) directly to The Rotary Foundation
- This gift can be made without increasing federal gross income for that tax year
- Available from now until 31 December 2011





Life Income Agreements

- A **Life Income Agreement** enables donors to receive income for life from their charitable gift.
- Types of Life Income Agreements available through TRF:
 - Charitable Gift Annuity
 - Deferred or Flexible Charitable Gift Annuity
 - Charitable Remainder Annuity Trust
 - Charitable Remainder Unitrust
 - Charitable Lead Trust
 - Pooled Income Fund





Testamentary Gift Options

Gifts that benefit The Rotary Foundation after the donor's death.

Testamentary Gift options:

- Wills
- Living Trusts
- Life Insurance





Stewardship of the Donor

- Recognition presentation at club, District Conference, and special events
- Letter from District Governor
- Thank you calls from DG, DRFC, DPFC, or Program alum
- Article in District newsletter
- Major Donor event at Conference or in conjunction with District TRF Seminar
- Make it an ongoing process





*Make a
Difference in the
Lives that
Follow*





For Additional Information

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