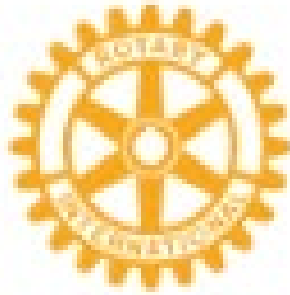


# Our Foundation Legacies: Promises Kept and Lives to Change

June 8, 2023      5:30pm CT/6:30pm EST

Heart of America  
**Rotary**  
Zones 30 & 31



**IMAGINE  
ROTARY**



# To help with this meeting

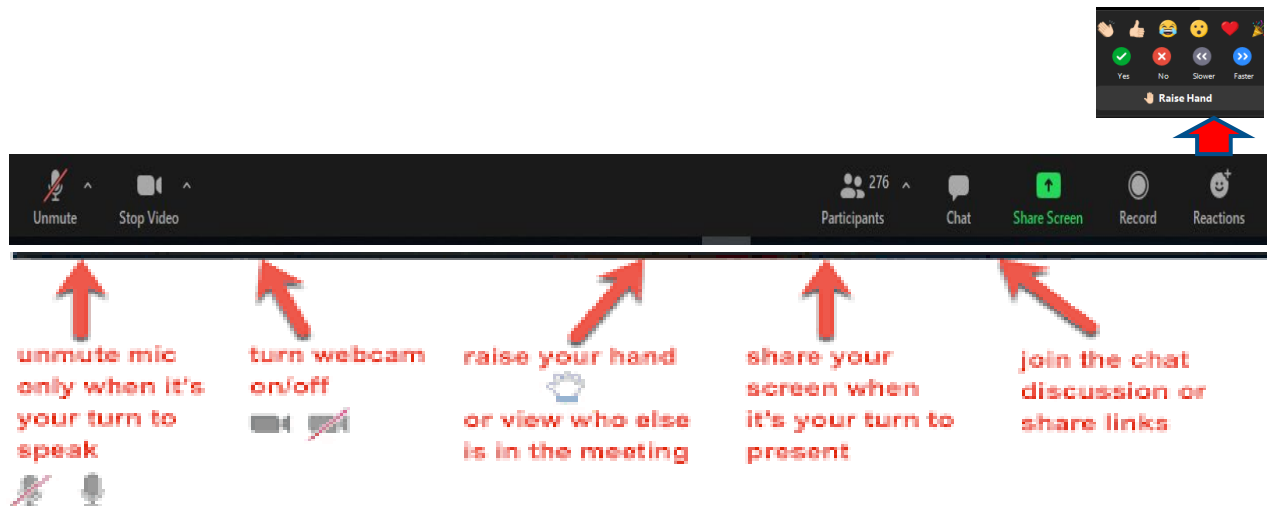
Please Rename yourself to:

Your Name & Club: Jane Smith Springfield Metro

To do this,

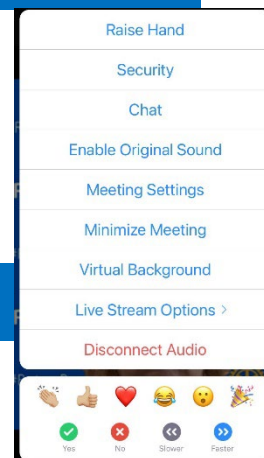
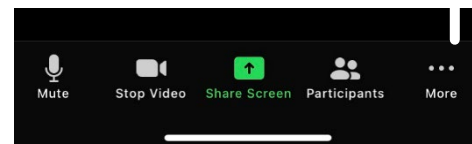
- Tap/Click on “Participants” at the bottom or top of the video window
- Tap/Click on your name
- Choose “Rename”
- Type in your new name like the one above
- Tap/Click “OK or press the Enter key

# RULES OF THE ZOOM



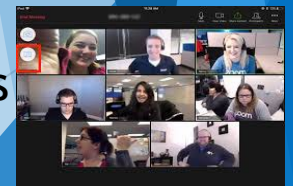
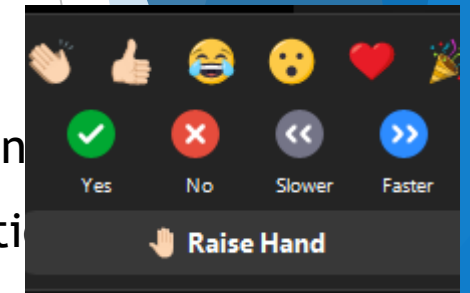
## Desktop Control View

## Tablet/Smartphone View



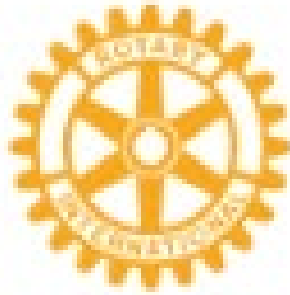
## Participants

- ▶ Please activate your video webcam
- ▶ Please remain **muted** until called upon
- ▶ If using a phone for audio, **please self mute** and unmute when called upon.
- ▶ Utilize “chat” function
- ▶ Utilize “raise hand” function in reaction
- ▶ **If the meeting is interrupted and ends, please wait 5 min and log in again**
- ▶ Gallery view will show all attendees
- ▶ Speaker view will show current speaker and is view available on an Ipad or tablet

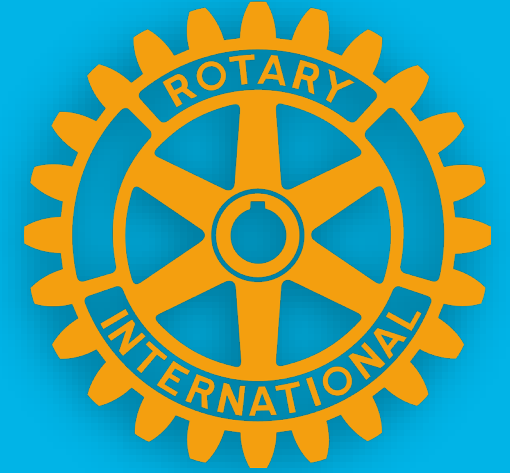


# Our Foundation Legacies: Promises Kept and Lives to Change

Heart of America  
**Rotary**  
Zones 30 & 31



**IMAGINE  
ROTARY**



# YOUR LEGACY, ROTARY'S PROMISE



# AN IMMEDIATE IMPACT

---

Annual gifts to your favorite Rotary programs help people live better lives today.





# A LONG-TERM IMPACT

---

Build a Rotary legacy with planned gifts to the Endowment. These support your favorite life-changing programs for the long term.

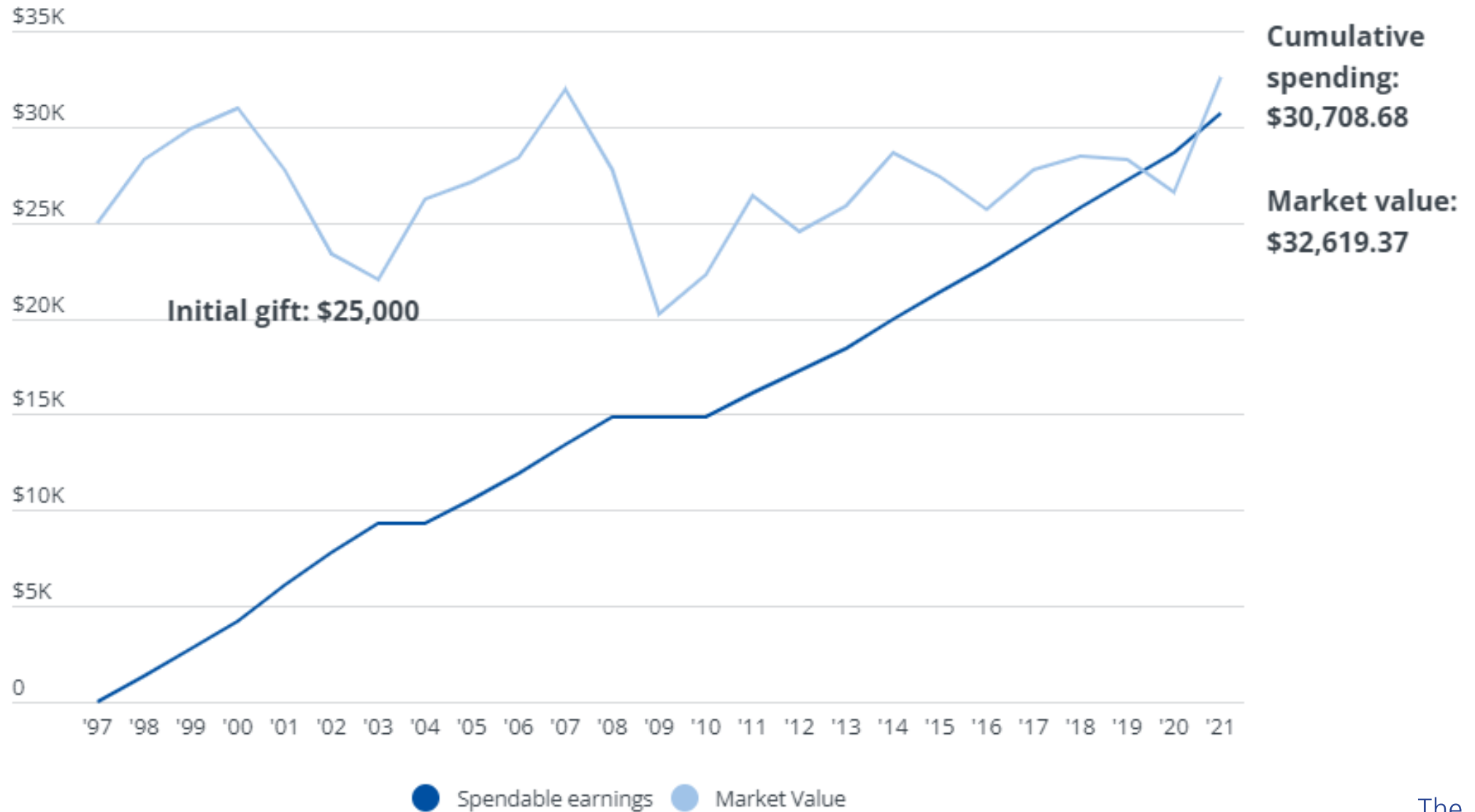


*Rotary's tomorrow depends  
on what we do today.*





# YOUR ROTARY LEGACY



The illustration depicts past performance and cannot be relied upon as an indicator of future performance.

# NOW

---

A gift made during your lifetime that allows you to see your legacy in action

# LATER

---

A documented promise of a gift that makes an impact on the future, not on your finances



How many of you have made an outright gift to the Endowment Fund?

How many of you have made a commitment/pledge to the Endowment Fund?

If you have not yet contributed or committed to the Endowment Fund, please consider taking a few minutes to use or download the link in the chat box to make an outright gift?



# WORLD FUND

General support wherever the need  
is greatest



# SHARE

Split evenly between World Fund &  
District Designated Funds



# MAKING A BEQUEST

---

This method of transferring assets is usually documented in a will or estate plan.



# NAMING THE ROTARY FOUNDATION AS BENEFICIARY

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This can be used for:

- Certain life insurance policies
- Retirement assets
- Bank or investment accounts







# Your Rotary Legacy

Doing Good in the World  
beyond your lifetime

We have made a commitment to  
Rotary Foundation Endowment.

appear on recognition materials and/or for future

vince, country, and postal code

Rotary club name

ile phone

on of the gift shall be:

und)

and District Designated Fund)

focus:

t prevention/resolution

n and treatment

on

health

literacy

unity development

e number above to  
nces.

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, an engraved  
recognition crystal and 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.
- ☐ 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 back cover.



# RECOGNITION

## Immediate gifts

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- Benefactor US\$1,000+
- Major Donor US\$10,000+
- Arch Klumph Society US\$250,000+

## Planned gifts

---

- Benefactor US\$1,000+
- Bequest Society US\$10,000+
- Legacy Society US\$1 million+

# RECOGNITION

## Rotary's Promise Club

You can inspire others and find opportunities to be distinguished as a Rotary's Promise Club.





# BUILD A CULTURE OF PHILANTHROPY

At home and in your community







# YOUR LEGACY, ROTARY'S PROMISE





[ROTARY.ORG/LEGACY](https://rotary.org/legacy)









# PERSISTANCE

## Progress on polio:

1985: Rotary International launches PolioPlus, the first and largest internationally coordinated private sector support of a public health initiative, with an initial pledge of US\$120 million. Polio was endemic in 125 countries.

Today: There are only two endemic countries left. 4 cases in Afghanistan, 1 case in Pakistan in 2023.

We are literally THIS CLOSE to fulfilling our promise.

Video explaining Polio :

[www.facebook.com/watch/?v=921427748399146](https://www.facebook.com/watch/?v=921427748399146)

## **EPN and Gates Foundation Matching Campaign**

While the books have not closed for May, here are the latest numbers. Cash \$30,381, DDF \$3,782, WF and other 2,065 for a total of \$36,228. This compares to \$30,648 last year, Remember we had one \$5,000,000 gift from LDS Charities which makes up most of the difference for this year. DDF is up about \$65,000. We need to get more DDF and cash for Polio Plus Society.

**The Gates Foundation** will match two-to-one, up to US\$50 million per year, every dollar Rotary commits to polio eradication through 2025.

It costs about sixty cents to protect a child against Polio for life. Because of the Gates Foundation Match, a gift of \$100 to PolioPlus will result in \$300 worth of Polio eradication work being done - protecting 500 children from Polio.



## **Two facts you should know about DDF:**

1. Over 200 districts have over \$100,000 in available DDF for a total of \$34 million plus.
2. All 519 districts have over \$53 million in available DDF. It would not take much of this DDF to ensure we reach our \$50 million goal.

# POLIO PLUS SOCIETY UPDATES

This has really taken off in multi districts.

Where they are asking people to contribute at least \$100 per year.

To help with launching this program you will soon have access to the below items on [www.endpolio.org](http://www.endpolio.org)

## **Resource Toolbox**

## **Enhanced Contribution Detail Report**





# ***QUESTIONS***



# Zone 30 Rotary Foundation Coordinator Team Members



**Dan Ryan**

Rotary Foundation  
Coordinator RFC  
[Contact](#)



**Deborah R. Alexander-Davis**

Asststant Rotary  
Foundation Coordinator  
ARRFC  
[Contact](#)



**Deborah L. Cheney PDG**

Asststant Rotary  
Foundation Coordinator  
ARRFC  
[Contact](#)



**Santhana Naidu**

Asststant Rotary  
Foundation Coordinator  
ARRFC  
[Contact](#)



**Maryjane Shackelford**

Asststant Rotary  
Foundation Coordinator  
ARRFC  
[Contact](#)



**Robert L. Huffman**

Endowment/Major Gift  
Advisor EMGA  
[Contact](#)



**Jerome Bannister**

End Polio Now Coordinator  
[Contact](#)



**Samuel Adams**

Paul Harris Society  
Coordinator  
[Contact](#)

## Assignments:

Maryjane Shackelford; 6670, 6690, 6710, 6740 | Debbie Alexander-Davis; 6760, 6780, 6860, 6880 | Santhana Naidu; 6540, 6560, 6580 | Deb Cheney; 6600, 6630, 6650



# Zone 31 Rotary Foundation Coordinator Team Members



**Pamela Anne Stewart**  
Rotary Foundation  
Coordinator RRFC  
[Contact](#)



**Alan Barth**  
Assistant Rotary Foundation  
Coordinator ARRFC  
[Contact](#)



**Suzanne Ellerbrock**  
Assistant Rotary Foundation  
Coordinator ARRFC  
[Contact](#)



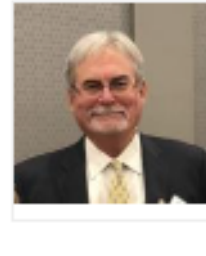
**Paul Reinert**  
Assistant Rotary Foundation  
Coordinator ARRFC  
[Contact](#)



**Lance Allen Singleton**  
Assistant Rotary Foundation  
Coordinator ARRFC  
[Contact](#)



**Jennifer Van Houtte**  
Assistant Rotary Foundation  
Coordinator ARRFC  
[Contact](#)



**R. Michael Groom**  
End Polio Now Coordinator  
[Contact](#)



**Ted Huffhines**  
Endowment/Major Gifts  
Advisor EMGA  
[Contact](#)

## Assignments:

Alan Barth; 6190, 6200, 6800, 6820, 6840 | Suzanne Ellerbrock; 6460, 6490, 6510 | Jennifer VanHoutte; 6110, 6150, 6170 | Paul Reinert; 6040, 6060, 6080 | Lance Singleton, 5830, 5750, 5770

The  
**Rotary**  
Foundation



Tonight's recording will be posted to: <https://rizon30-31.org/events/zone-webinars/>

**THANK YOU!**  
**AND**  
**FINISH THE YEAR STRONG!**