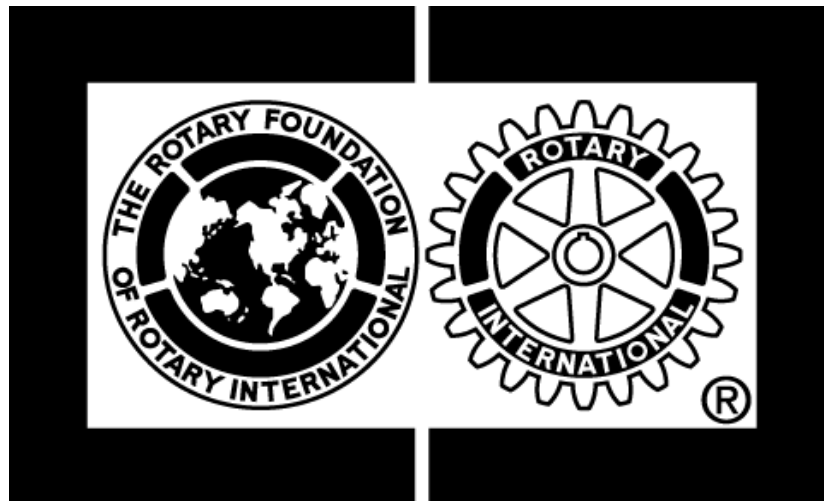


# THE ROTARY FOUNDATION



District \_\_\_\_\_

## MILLION DOLLAR DINNER DISTRICT SUGGESTED GUIDELINES

# THE ROTARY FOUNDATION



## MILLION DOLLAR DINNER Background and Suggested Guidelines

**History:** The “Million Dollar Dinner” originated in Rotary District 5110 (Oregon) around 2004. The concept is very simply, but has proved to be quite successful as it continues to spread from district to district. Previous dinners have raised from \$1.6 to \$4.2 Million in new gifts/commitments.

**Goal:** To raise a minimum of One Million Dollars for the programs of The Rotary Foundation or the Bequest Society of The Rotary Foundation with minimum donations of \$10,000 from each donor.

### **Suggested Guidelines:**

- Select the date and location for your “black tie” dinner. The purpose of the dinner is to thank donors who are making or adding new contributions/commitments of \$10,000 or more to the programs of or The Bequest Society of The Rotary Foundation.
- Select a District “Million Dollar Dinner” Chair who selects two Co-Chairs who are committed to managing five Table Captains. (See Exhibit 1) and obtain District/Rotary club sponsorships to cover the cost of the “black tie” dinner.
- The five Table Captains identify and solicit Rotarians and friends of Rotary with the capacity and interest in making or adding new contributions/commitments of \$10,000 or more to the programs of or The Bequest Society of The Rotary Foundation. (See Exhibit 1) (Note: The goal is to have each table with 10 guests who make a new contribution or commitment of \$10,000 or more; therefore each table raises \$ 100,000.00, ten tables of \$ 100,000.00 equals One Million Dollars for the Rotary Foundation. (See Exhibit 2).
- Make a list of the desired Rotary International Senior Leaders who you would like to be your Guest Speaker. The staff of the Rotary Foundation will assist you in making these arrangements. Dinner guests will have the opportunity to meet and hear from the Rotary International Senior Leader. Donors will also receive their donor recognitions and have their picture taken with the Senior Leader. (Note: It is suggested that at least \$ 500,000.00 in new contributions/commitments of \$10,000 or more be received 90 days prior to the event so that the arrangements of the Rotary International Senior Leader can be confirmed).

- When a new donation or commitment is received by a Table Captain:
  - A Bequest Society Membership Card (Exhibit 3 & 4) is obtained from the donor and forwarded to the District “Million Dollar Dinner” Chair along with the donor’s contact information
  - A sample Will and Codicil Language for The Rotary Foundation (United States) is sent to the donor for their completion and documentation of their commitment to The Rotary Foundation (Exhibit 5) can be recorded.
  
- When the Bequest Society Membership Card and contact information is received from the Table Captain, the District “Million Dollar Dinner” Chair:
  - Forwards the Bequest Society Membership Card to the Rotary Foundation Major Gifts Officer so that the donor’s new contributions/commitments is properly recorded and their recognition materials (crystal and Bequest Society diamond pin) can be ordered in a timely manner.
  - Sends an invitation to the “Million Dollar Dinner” to the donor (Exhibit 6). (Note: The dinner invitation is sent to couples or individuals who are making or adding new contributions / commitments of \$10,000 or more to the programs of or The Bequest Society of The Rotary Foundation. *Exception:* Arch Klumph Society Members (\$250,000+ donors) are welcome to attend.
  - Prepare an accounting of the new contributions/commitments is prepared by District “Million Dollar Dinner” Chair (Exhibit 7) who shares it on a weekly basis with:
    - The Rotary Foundation Major Gifts Officer
    - The two Co-Chairs
    - The ten Table Captains

We wish you the very best on your District’s “Million Dollar Dinner”. Please contact me if you need any assistance or you have any questions or comments concerning the enclosed.

Greg E. Podd, C.P.A., P.F.S.  
Past District Governor / Zone 25 Major Gifts Advisor 2008 - 2009  
5968 East Sapphire Lane  
Paradise Valley, Arizona 85253  
Email: [Greg@pfscpa.com](mailto:Greg@pfscpa.com)  
Phone: 480-609-7100 or cell 602-400-5470

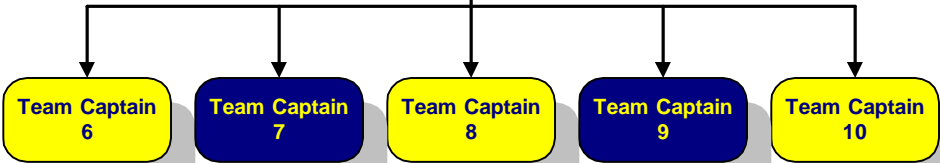
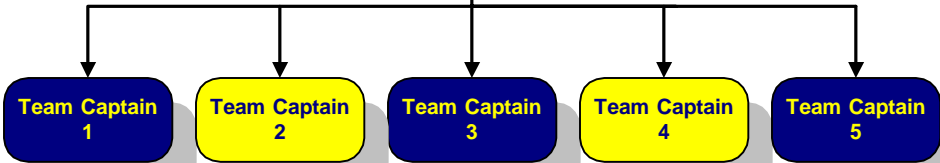


# Rotary International Million Dollar Dinner

District \_\_\_\_\_

**Co - Chair**

**Co - Chair**



Rotarians and Friends of Rotary

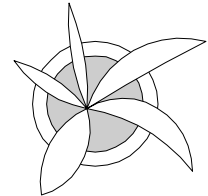
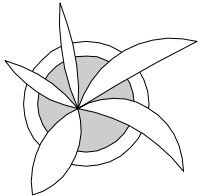
## The Rotary Foundation





# Rotary International Million Dollar Dinner

District \_\_\_\_\_



**Table 1**  
10 Individuals  
at 10,000

**Table 2**  
10 Individuals  
at 10,000

**Table 3**  
10 Individuals  
at 10,000

**Table 4**  
10 Individuals  
at 10,000

**Table 5**  
10 Individuals  
at 10,000

**Table 6**  
10 Individuals  
at 10,000

**Table 7**  
10 Individuals  
at 10,000

**Table 8**  
10 Individuals  
at 10,000

**Table 9**  
10 Individuals  
at 10,000

**Table 10**  
10 Individuals  
at 10,000



## The Rotary Foundation



MEMBERSHIP CARD

SOCIETY



BEQUEST



**BEQUEST SOCIETY CRYSTAL**  
**Send the completed Membership Card to:**

The Rotary Foundation (FN300)  
One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
**Or fax to:** 847-866-1894

Level	Commitment Range	Recognition Item
One	US\$10,000-\$24,999	One-Diamond Pin plus Bequest Society Crystal
Two	US\$25,000-\$49,999	Two-Diamond Pin plus Bequest Society Crystal
Three	US\$50,000-\$99,999	Three-Diamond Pin plus Bequest Society Crystal
Four	US\$100,000-\$499,999	Four-Diamond Pin plus Bequest Society Crystal
Five	US\$500,000-\$999,999	Five-Diamond Pin plus Bequest Society Crystal
Six	US\$1,000,000 Plus	Six-Diamond Pin plus Bequest Society Crystal

For more information, visit the RI Web site: [www.rotary.org](http://www.rotary.org)

**Yes**, I/we would like to become a member(s) of The Rotary Foundation Bequest Society.

This is a JOINT bequest and both spouses' names should appear on the crystal.

Name(s) \_\_\_\_\_

\_\_\_\_\_  
*(Please print/type name[s] as you wish it to appear on the crystal.)*

Address \_\_\_\_\_  
*(Street)*

\_\_\_\_\_  
*(City, state and zip code)*

District \_\_\_\_\_ Rotary Club \_\_\_\_\_

Date(s) of Birth \_\_\_\_\_  
*(husband)* \_\_\_\_\_ *(wife)*

Telephone (Home) \_\_\_\_\_ (Business) \_\_\_\_\_

E-mail \_\_\_\_\_

**I designate that the spending portion of my gift will be applied:**

at the Trustees' discretion (World Fund)     through *SHARE* (District Designated Fund and World Fund)

to the Children's Fund (World Fund)     to the Rotary Centers for International Studies

**My Bequest will be funded by:**

Will     Living Trust     Life Insurance     Charitable Remainder Trust\*

IRA/401(k)/Retirement Plan     Other \_\_\_\_\_

The amount to The Rotary Foundation will be \_\_\_\_\_ % and/or US\$ \_\_\_\_\_  
*(The anticipated amount is necessary to establish recognition level.)*

I have opted to mail a copy of my:     Will     Trust     Life Insurance Policy for retention at  
The Rotary Foundation (FN300), One Rotary Center, 1560 Sherman Avenue, Evanston, IL 60201-3698 USA

Please do not list my name in any publications or reports.\*\*

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

*\*Gifts made through a Charitable Remainder Trust count towards Major Donor recognition.*

*\*\*The Rotary Foundation appreciates information about commitments. Your name and level may be published to inspire others unless you check the box above. We recognize the personal nature of these commitments and assure that the details will be kept confidential.*

# Sample Will and Codicil Language for The Rotary Foundation (United States)

If you are drafting a new will or codicil or establishing a trust, the following is sample language that can be used in making a bequest to The Rotary Foundation of Rotary International:

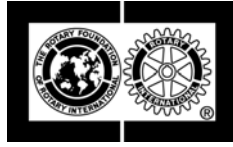
"I give to The Rotary Foundation of Rotary International, an Illinois not-for-profit corporation, located in Evanston, Illinois (**insert here the sum, description of property, or percentage of residual estate**) This gift is to be placed in said Foundation's endowment, The Rotary Foundation Permanent Fund, from which a spending portion will be used to support the Foundation's activities and programs."

Unless further directed by the donor, the spending portion will be directed to support Foundation programs as determined by the Trustees of The Rotary Foundation. If it is your intention that a portion of the spending be directed through a specific Rotary district, please indicate this on the Benefactor Commitment Card.

*The Rotary Foundation urges you to seek advice from a legal or financial professional of your choosing in all matters pertaining to a bequest or living trust.*

---





**In Appreciation of Your Significant Support of  
THE ROTARY FOUNDATION**

**You Are Invited to Attend**

**Rotary International District \_\_\_\_\_ MILLION DOLLAR DINNER**

**On**

\_\_\_\_\_

**At**

\_\_\_\_\_

\_\_\_\_\_

**Hospitality from 6:00-7:00**

**Dinner 7:00-9:00**

**The Evening's Guest Speaker is**

\_\_\_\_\_

\_\_\_\_\_

**The courtesy of an RSVP by \_\_\_\_\_ is requested.**

**RSVP to \_\_\_\_\_**

**Black Tie Optional/ By Invitation Only**

District _____ "Million Dollar Dinner"													
Accounting of New Contributions/Commitments													
Number	Last Name	First Name	Rotary Club	Co-Chair	Table Captain	Contributions		Commitment		For Rotary Foundation Use			
						Cash Amount		Bequest Amount		Current/Change		Order On	
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													
21													
22													
23													
24													
25													
26													
27													
28													
29													
30													

Exhibit 6