



Permanent Fund of the Rotary Foundation

This is another way of giving to The Rotary Foundation. We talk all the time about Annual Giving of TRF, and do not discuss this “Smart Balance” the Foundation is trying to achieve. Unlike the APF (Annual Giving Program), PF (Permanent Fund) is not touched for any programs directly. The money is invested, the money grows, and the income can be used from time to time; the amount allowed to be used by the districts or the WF (World Fund) from time to time may vary and is at the discretion of the Foundation Trustees. (See the Logo)

If Annual Giving covers today's need, PF will cover tomorrows, and Rotary's Humanitarian, Educational and Cultural Programs will continue into the centuries to come. I think it is a smart balance!

Permanent Fund is an endowment. It takes outright cash as well as bequests.

1. Outright cash as a major donor. Major Donor Recognition occurs when an individual or a couple contributes a combined personal outright gift(s) of US \$ 10,000 to \$1000,000 or more to TRF. There are 6 levels of contribution.

- It is a good way to get a tax deduction.
- Sometimes Rotarians want to transfer highly appreciated stocks. They can take full deduction for the amount donated without paying Capital Gain.
- Rotarians can transfer real estate where the title is clear and no mortgage liability for TRF.
- Rotarians can transfer the ownership of Life Insurance Policy of an individual 18 years and older.
- Rotarians can also donate from their IRA account.

2. The Rotary Foundation also accepts Bequests. Becoming member of TRF Bequest Society is a simple process. Membership occurs when an individual or a couple place TRF in their estate plan for a minimum of US \$ 10,000 and notify the Foundation. The procedure is simple. Just complete a Bequest Society membership card and send it to TRF. There are 6 levels of recognition.

3. Donors whose cumulative contributions are US \$ 250,000 or more may opt to have their photograph permanently displayed in the Rotary Hall of Honor at World headquarters in Evanston, Illinois.