

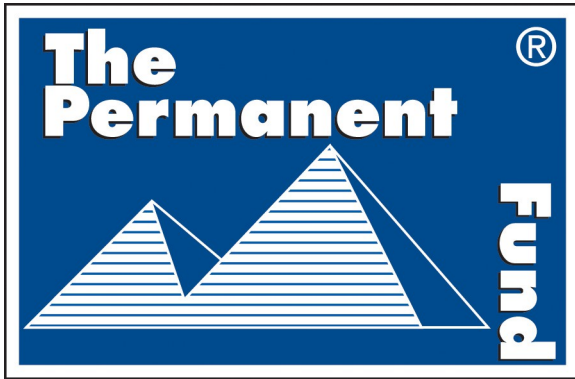
WHAT IS The Endowment Fund? (Formerly The Permanent Fund, Logo TBD)

Where the Annual Fund of the Rotary Foundation is the CHECKING ACCOUNT



The Endowment Fund is the SAVINGS ACCOUNT,
Whereby **none** of the Principal \$\$\$ are spent, ever.

The earnings are contributed to the Annual Fund to expand funding and act as the *Rainy Day* fund in the event of unexpected events.



WAYS OF GIVING:

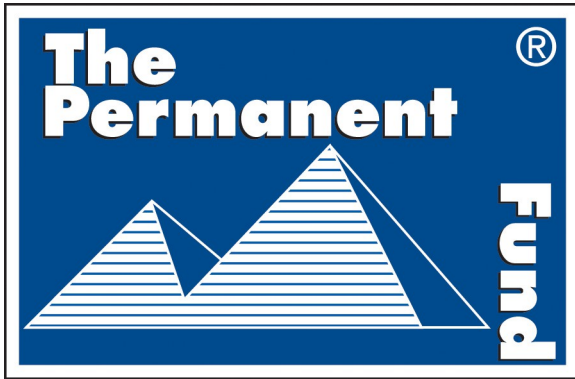
Most giving to the Endowment Fund is through promise of a contribution or estate at a later time...via a simple promise (Benefactor Card), life insurance instructions, Will codicile or other arrangements.



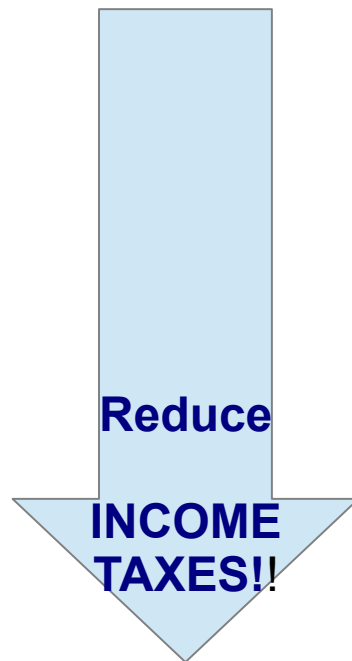
Treacy's attempt at humor!

Many Rotarians are realizing the *advantages* of giving appreciated assets or cash too!

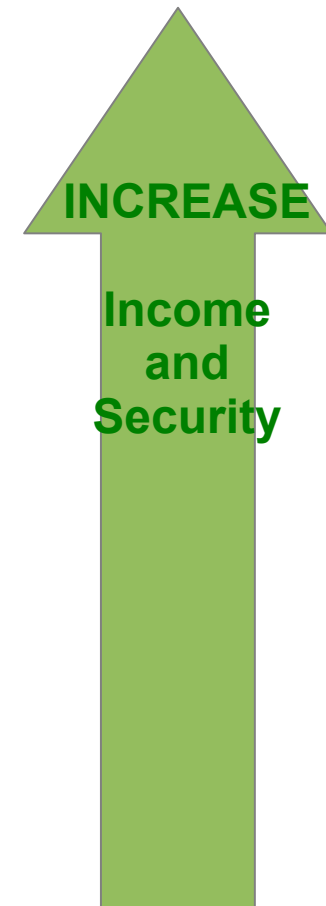
All made easy at **866-9ROTARY**

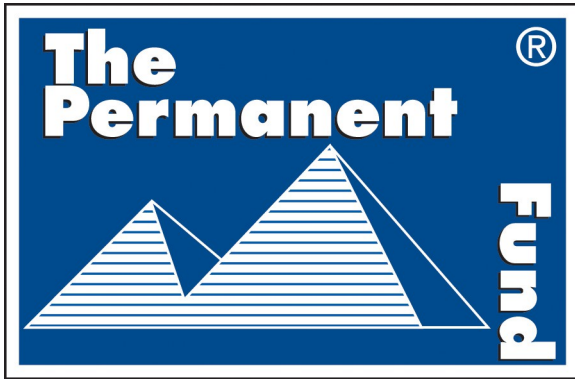


WHY GIVE APPRECIATED ASSETS or CASH?



Some Rotarians have appreciated assets that make no sense to sell after taxes on gains. Further, these assets may not be income producing. Many Rotarians can use upfront tax breaks. "Safe" money at a bank is earning < 2%..*why not let TRF pay 4%+ ???*





How Endowment Fund Gifts are Recognized:

Assets/Cash or Promised Gift of \$1,000+ =
BENEFACTOR

Assets/Cash or Promised Gift of \$10,000+ =
BEQUEST SOCIETY



And of course, \$10,000+ Assets/Cash
also = **MAJOR DONOR**



***Endowment Fund giving is not recognized with PHF points!!