

*An estate planning suggestion...*

**LEAVE ROTARY SOMETHING MORE THAN YOUR MEMORY  
with a *Planned Gift* to our Club Endowment.**

Membership in the Rotary Club of Ann Arbor involves a commitment to community service, both through personal volunteer activities and through our ongoing financial commitment to support local nonprofit community service projects and organizations. Primarily, we meet the financial part of this commitment with our mandatory annual community service assessment of currently \$170 per member, which all goes to current support for such projects and organizations, as chosen by our Community Service Allocation Committee. But it is by no means our *only* financial opportunity for community service. Additional, voluntary annual giving is encouraged – either for current distribution with assessment funds, or to the Club’s Endowment, in which it will be held permanently, invested carefully, and, in accordance with the Club’s distribution policy, an annual amount withdrawn added to the community service assessment for grants that will be recommended by the Community Service Allocation Committee.

To help the Endowment’s Permanent Fund achieve (and even *surpass*) our targeted \$100,000 goal as a distribution from the Club’s Endowment Fund in five (5) years, members are encouraged to make major ***Planned Gifts*** which will take effect upon their deaths. By doing so, you can assure that your commitment to Rotary and community service lives on long after you are gone. To accomplish this, simply include in (or add to) your will or trust a gift to the Ann Arbor Rotary Endowment. It may be a *specific bequest* of a designated dollar amount, a specific piece of property, or a portion of your estate expressed in percentage terms; a *residuary bequest* leaving to the Endowment all that remains of your estate after debts, taxes, expenses and satisfaction of other bequests; or a *contingent bequest* leaving your estate (or a designated portion of it) to the Endowment if other named beneficiaries are not living at the time of your death. You will want to consult your attorney about the particulars of your situation, of course, but here is suggested wording for specific and residual bequest:

**Specific Bequest:**      *I give and devise to the Ann Arbor Rotary Endowment, a Michigan nonprofit corporation,*  
a) *The sum of \_\_\_\_\_ Dollars (\$\_\_\_\_\_); or*  
b) *A portion of my estate totaling \_\_\_\_\_ percent (\_\_\_\_%) thereof, or*  
c) *The following described real estate or personal property:*  
\_\_\_\_\_, *to be held,*  
*used and disposed of in the Endowment’s Permanent Fund, in accordance with*  
*its stated purposes, as its Trustees shall direct.*

**Residual Bequest:**      *All (or \_\_\_\_\_%) of the residue of my estate, real and personal, of whatever kind and wherever situated, which I own or have the right to dispose of at the time of my death, I give and devise to the Ann Arbor Rotary Endowment, a Michigan nonprofit corporation, to be held, used and disposed of in the Endowment’s Permanent Fund, in accordance with its stated purposes, as its Trustees shall direct.*

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Members also may leave planned gifts to the Rotary Foundation of Rotary International, which will hold them in perpetuity, distributing income to support its international humanitarian, cultural and educational activities. The same language suggested above may be used for planned gifts to The Rotary Foundation substituting for the phrase “Ann Arbor Rotary Endowment, a Michigan nonprofit corporation,” the phrase “*The Rotary Foundation of Rotary International, an Illinois nonprofit corporation and omitting reference to “the Endowment’s Permanent Fund.”*” For additional information about planned giving to The Rotary Foundation, including charitable remainder trusts, gifts of life insurance, and The Foundation’s Pooled Income Fund, contact the Endowment/ Planned Gifts Section of The Rotary Foundation at 1560 Sherman Avenue, Evanston, IL 60201.

