

VISIONS

Charitable Estate & Financial Planning Ideas from The Rotary Foundation



Megan Tilley (center), Rotary Club of St. Ives (District 9685), is a generous member of Rotary's Bequest Society who prefers to work "behind the scenes" at club events.

CELEBRATING THE PAST AND SUPPORTING THE FUTURE

As The Rotary Foundation celebrates 100 years of doing good in the world, Megan Tilley reflects proudly on her own half-century of serving humanity through Rotary, starting her career of service and philanthropy as a member of the Rotaract Club of St. Ives, NSW. "After 50 years in the Rotary Family, I guess you could say that Rotary is in my blood!"

History is particularly important to Megan, who is passionately devoted to studying genealogy. She retired after 30 years working in the Information Technology industry and attributes much of her knowledge in business ethics to her first boss. "It was only after I joined Rotary that I found out he was a Rotarian," Megan said. "Looking back, I can see that he employed The Four-Way Test throughout his working life, and I have tried to do the same."

Megan has held several positions within her club and even served as 2010-11 District Secretary under Past District Governor George Papallo, who invited her to join the St. Ives Rotary Club in 1997. Over the years she has made many gifts to The Rotary Foundation, including a bequest in her estate plan to the Endowment to fund a lasting legacy that will fulfill her charitable goals for the next century and beyond.

She prefers to give her gifts to SHARE because it allows her contributions to benefit her district in addition to helping people across the globe lead better, safer, and healthier lives.

See Page 2 to learn more about how Megan plans to support her values and charitable goals with Rotary for generations to come.

10 THINGS YOU CAN DO TODAY

1. Prepare a will. Without one, you lose control of the assets you worked a lifetime to acquire.
2. Leave a gift in your will for The Rotary Foundation of Rotary International.
3. Leave a specific dollar amount or a percentage of your estate. The provision can be part of a new will or added to your existing will as a codicil.
4. Ensure that your annual support continues automatically over the next century and beyond by making a bequest to The Rotary Foundation equal to 25 times your usual annual contribution. (You can provide US\$1,000 in annual support forever by making an estate gift of approximately US \$25,000.)
5. Name The Rotary Foundation of Rotary International as the beneficiary of your superannuation plan.
6. Name The Rotary Foundation of Rotary International as the beneficiary of an existing life insurance policy.
7. Honor the memory of deceased loved ones with memorial gifts.
8. Encourage family members and Rotary friends to leave gifts in their wills.
9. Ask your financial advisors to include charitable giving to The Rotary Foundation of Rotary International in their counsel to other clients.
10. Lead by example by being recognised as a benefactor or Bequest Society member at your club or district meetings.



Megan Tilley, Rotary Club of St. Ives (District 9685), shaking hands with then-President Ron Burton at the 2014 International Convention in Sydney.

A GIFT THAT KEEPS ON GIVING

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"I find it much easier to track the impact of my donations as I can see results in the district grant activity," said Megan.

"I also know that the administrative overhead is one of the lowest in all charitable organisations, so I know that the maximum amount of my donation is used and not hived off to cover administration expenses."

Focusing her giving on The Rotary Foundation has made it easier for Megan to achieve her philanthropic goals. "By reducing the number of charitable organisations I donate to, I have an easier time ensuring the maximum donation to an organisation that will use my donation well."

Megan has built her legacy on gifts that will grow over time through Rotary's Endowment, providing continual funding for the programs and services she has seen improve lives locally and all over the world. "I wanted my estate to continue to provide for the community when I was gone. What better way than to establish a bequest to do so!"

Students at recess at Lavena Parrotfish Kindergarten on Taveuni Island in Fiji. Rotary clubs in Australia and New Zealand worked with the Rotary Club of Taveuni Island, Cakaudrove, Fiji, to furnish this school.



WHAT IS YOUR LEGACY?

Outright gifts to the Annual Fund from your credit card or direct from your bank account strengthen Rotary programs each year. A planned gift to The Rotary Foundation from your savings or an estate plan will support these programs forever.

Your generosity will continue to provide, year after year, and will ensure that future generations of Rotarians have the support they need to carry on your legacy.

Special naming opportunities are available for endowed and term gifts to recognise the donor or a loved one at the US \$25,000 level.

Learn more about special recognition opportunities on the next page.



The Rotary Club of Freshwater Bay (District 9455) share their passion for science by providing classrooms in Western Australia with microscopes to help students learn about plant structure and soil composition.

BE LEGENDARY

When you plan a gift to Rotary through your estate or financial plans, you are continuing a 100-year tradition of uniting leaders from all continents, cultures, and industries for the common good.

Rotary is pleased to confer Benefactor status on those who commit any amount in their estate plan to the Endowment. Benefactors receive personalised certificates and a special insignia to wear with their Rotary pins.

You may also be eligible to join The Rotary Foundation's Bequest Society, a group of dedicated humanitarians who have devoted their resources to furthering the Foundation's mission for years to come. Members receive special Foundation updates, invitations to events, an engraved crystal, and an exclusive pin or pendant. When you invest in the Foundation's future, you will retain your membership regardless of fluctuations in your financial portfolio or other assets.

Be legendary and plan your gift today.

At-risk Aboriginal youth participate in vocational training as part of a global grant supported by the Rotary Club of Bribie Island (District 9600).



FOR MORE INFORMATION

The Rotary Foundation is happy to help you or your advisors explore how you can establish an enduring legacy that will continue to support your charitable goals for generations to come.



THE ROTARY FOUNDATION OF ROTARY INTERNATIONAL

P.O. Box 1415
Parramatta NSW 2124
Phone: +61 2 8894 9800 · Fax: +61 2 8894 9899