

RESPONSE CARD

I want to create a lasting impact through the Endowment Fund of SMRC. Please contact me and provide more information.

I have already included The Endowment Fund of SMRC in my will or estate plan. Please include me in the Legacy Society.

I want to make a gift to The Endowment Fund of SMRC today. My check is enclosed.

Name _____

Street _____

City _____

State _____ Zip _____

Phone _____

Email _____

Please mail to:

San Marino Rotary Charities

P.O. Box 80301

San Marino, CA 91118



The Endowment Fund of San Marino Rotary Charities



Giving for a Lasting Impact

The Endowment Fund of SMRC

Through the generosity of Rotarians like you, San Marino Rotary Charities (SMRC) funds sustainable projects that help people in our community, region and around the world. Whether it is a new athletic field, an updated park, a reading program for our community's children, development of young leaders in our schools, service to the poor and homeless, or clean water, food and desperately needed medicine abroad, SMRC makes a very real and positive difference in the lives of others.

The important work of SMRC connects us as Rotarians to those who need our help today and The Endowment Fund of SMRC will connect us to those who will need our help tomorrow. The Endowment Fund gives San Marino Rotarians the independence and flexibility to meet immediate needs in education, healthcare, social services, economic development and more, as well as, the resources to work within the structure of Rotary International's grant-making programs.

In either case, The Endowment Fund gives each of us the chance to create a meaningful legacy in support of the values the Rotary Club of San Marino and Rotary International espouse.



Rotary Founder, Paul Harris

Why do we need an endowment?

Rotary members are responsible leaders, both socially and ethically. We affect local communities on a global scale to create lasting change. From the founding of our movement Rotarians have worked to ensure its legacy. The work we have done in our own community deserves a strong legacy, as well.

The Endowment Fund of SMRC will enable San Marino Rotarians to carry on our charitable work long into the future. The steady stream of income generated by the Fund will ensure that programs in need of our support continue to receive it, regardless of the year-to-year performance of the club's fund raising activities.

Your gift can also be a part of your personal legacy and a permanent source of support that reflects your values as a member of this club.

HOW DOES AN ENDOWMENT WORK?

The initial gift made to an endowment is never spent. Instead, the money given is invested to generate income through appreciation, interest and/or dividends. These earned monies are then distributed to support those causes aligned with the values and history of San Marino Rotary and Rotary International.

IS MY GIFT TAX-DEDUCTIBLE?

Yes, your current gifts to the Endowment Fund of SMRC are deductible for State and Federal Income Tax purposes. Bequests to the Fund may also reduce the taxable value of your estate. Of course, you should consult with your tax professional before making a commitment.

HOW CAN I PARTICIPATE?

You can make both undesignated and designated gifts. Designated gifts will be used for the specific purpose you set, provided it is in accordance with the guidelines of the fund, and meets a minimum contribution of \$25,000. Undesignated gifts may be made in any amount and will be used to support the general work of San Marino Rotary Charities.

There are many types of gifts that can help make a lasting impact. These include:

Gifts of Cash: Simplicity and ease of giving are the reasons that cash is most commonly given to endowment funds.

Gifts of Securities: A gift of securities may entitle you to an income tax deduction for the full market value of the securities as of the date of your gift. A gift of appreciated securities means you are not liable for the capital gains tax you might otherwise have to pay if you sold them.

Gifts of Real Estate: You may also give real property to the fund. If you've owned it for one year or longer the fair market value is deductible and no capital gains taxes are payable on appreciation. It also serves to remove the property from your taxable estate. You can even make a donation of a personal residence and retain the use of it throughout your life.

A Personal Will: In your will, you may decide to bequeath a percentage of your estate, a specific amount, or the remainder after bequests to other beneficiaries are made.

Gifts of Life Insurance: You may even designate The Endowment Fund of SMRC as the beneficiary of your life insurance policy.

HOW CAN I LEARN MORE?

Any member of The Endowment Fund Advancement Committee will be happy to talk with you and the committee will provide information on an ongoing basis through presentations to the club to acquaint you with the various types of gift instruments available. Please contact the Rotary Club of San Marino president or the president of San Marino Rotary Charities for more information.