PERPETUATE YOUR COMMITMENT TO ANN ARBOR ROTARY . . .

With a gift to the ANN ARBOR ROTARY ENDOWMENT

NOW, **with a single Annual Gift or a multi-year pledge, or**

LATER, **with a *planned gift* through your will or trust.**

EITHER WAY,
you will assure that both the Club and the Community are left with more than fond memories of your membership.

Rotary Club of Ann Arbor

Michigan U.S.A

11/04/11

ANN ARBOR ROTARY ENDOWMENT – PLANNED GIVING INFORMATION:

One way for club members to help Ann Arbor Rotary achieve its goal of $100,000 annual Endowment distributions to fund the Club's international and local service projects, college scholarships and other youth-focused programs is with a *planned gift* to the Endowment to take effect at your death. You may include such a gift in a new will or trust, a codicil to an existing will or amendment to an existing trust agreement, or by beneficiary designation for a retirement plan or life insurance policy death benefit. You can make either an outright gift of a specified sum of money, real or personal property, or a percentage of your probate or trust estate or retirement plan or insurance death benefit; a residuary bequest leaving all or a designated portion of what remains of your estate after payment of debts, taxes, expenses and other bequests; or a contingent bequest that will take effect if other named beneficiaries do not survive you. You are encouraged to consult your attorney and/or tax adviser about any such arrangement, but here is sample language for two of these forms of planned giving:

Specific Bequest: *I give 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 in the Endowment's Permanent Fund and used and disposed of in accordance with its stated purposes as its Trustees shall direct.

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

Statement of Planned Gift Intention

I have provided a gift of current estimated value of $_____ to the Ann Arbor Rotary Endowment in my will, trust agreement, retirement plan, insurance beneficiary designation, or another arrangement taking effect at my death. I have no current intent to revoke this gift, but understand that this statement does not constitute a legally binding agreement. For your records (*optional, check here* __), I have enclosed the relevant portion of my estate plan pertaining to this gift.

_____ Dated: _____

Sign above, print name here:

I also consent to recognition of this gift in Ann Arbor Rotary Club publications (*also optional* ___) with donor's name(s) appearing as follows:

_____

Please return this statement to Ann Arbor Rotary Endowment, P. O. Box 131217, Ann Arbor, MI 48113-1217.