

SECURING OUR FUTURE

DISTRICT 6450

LEGACY CAMPAIGN

The Rotary Foundation

DISTRICT 6450 LEGACY CAMPAIGN

Getting into a Legacy Giving Frame of Mind

Starting at Point A…

- I don't like thinking about my death! ☠️ ☠️ ☠️
- What if my kids need the money?
- Setting up legacy giving seems complex and expensive.
- What if my situation changes, and I change my mind?
- And finally: What do I want done with the money?

DISTRICT 6450 LEGACY CAMPAIGN

Getting into a Legacy Giving Frame of Mind

...and journeying to Point B

- (I still don't like thinking about my death! But oh well)
- My kids won’t need the money.
- If I do a bequest, it can be very easy and cheap.
- With a bequest, I can change my mind at any time.
- Rotary Foundation is a great destination for legacy giving

Why Leave a Legacy to Rotary?

Rotarians Watch Over Your Legacy

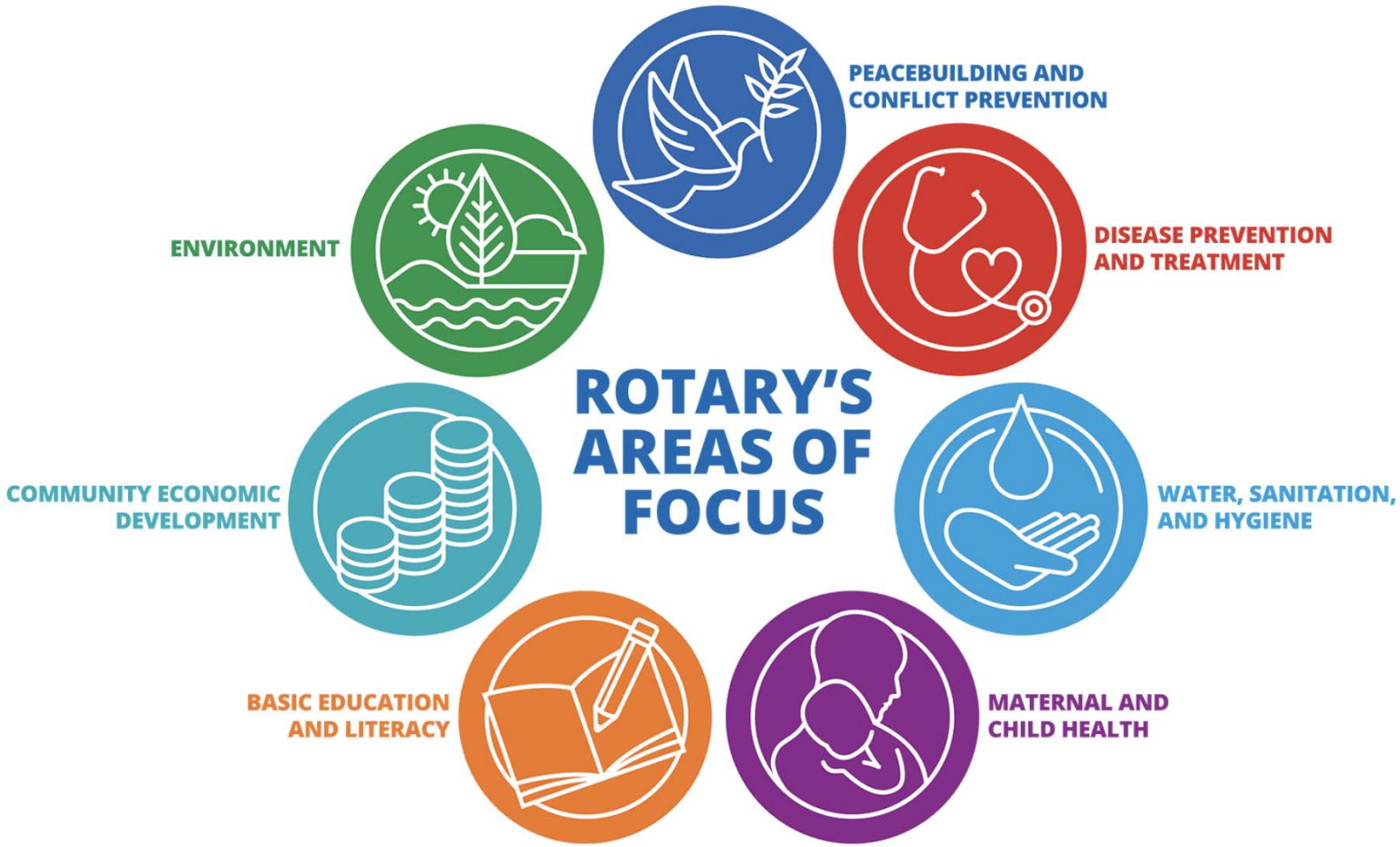
- Rotary Foundation grants are Rotarian-designed, Rotarian-initiated, Rotarian-controlled, Rotarian-managed.
- **Rotarians** get to say where the money goes to do good, and make sure it happens.
- **The Trustees, the Directors, and many of the Executive Staff (and the clubs, of course!) are Rotarians**
- The Board of Directors establishes policy for Rotary International and provides guidance that helps our clubs thrive.
- Clubs elect the members of the Board every year at the Rotary International Convention, and each director serves for two years.

TOP RATINGS

A top rating of 4 stars from Charity Navigator for 17 consecutive years



The Rotary Foundation


ROTARY'S AREAS OF FOCUS
PEACEBUILDING AND CONFLICT PREVENTION
DISEASE PREVENTION AND TREATMENT
WATER, SANITATION, AND HYGIENE
MATERNAL AND CHILD HEALTH
BASIC EDUCATION AND LITERACY
COMMUNITY ECONOMIC DEVELOPMENT
ENVIRONMENT

2024-25 FAST FACTS

1.26 MILLION
Rotarians and Rotaractors

BELONGED TO

46,000 CLUBS

IN



COUNTRIES AND TERRITORIES



India has the most Rotaractors, with 36,517



The U.S. has the most Rotarians, with 260,235

WE WELCOMED

209,125

NEW ROTARIANS AND ROTARACTORS AND CHARTERED

1,647

ROTARY AND ROTARACT CLUBS

130

fellows were selected for the 2025 Rotary Peace Fellowships program from over 1,570 applications

1,423

GLOBAL GRANTS AWARDED TO PROJECTS AND SCHOLARSHIPS

TOTALING

$88.2 MILLION

IN FUNDING

IN 109 COUNTRIES

74

approved disaster response grants, with US$2 million in total funding

468

distributed district grants, with US$29.0 million in total funding

86
peacebuilding and conflict prevention grants, totaling US$3.9 million

673
disease prevention and treatment grants, totaling US$43.9 million

168
water, sanitation, and hygiene grants, totaling US$11.8 million

131
maternal and child health grants, totaling US$7.3 million

127
basic education and literacy grants, totaling US$7.1 million

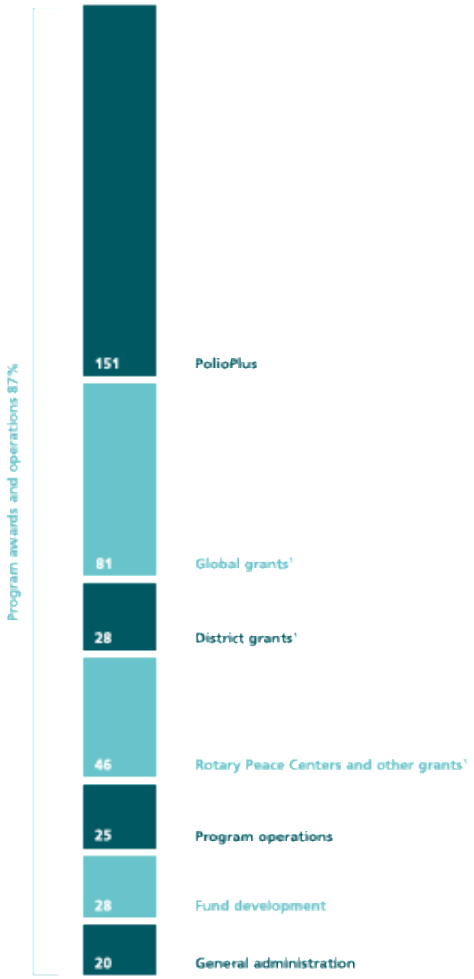
163
community economic development grants, totaling US$9.6 million

75
environment grants, totaling US$4.5 million

Rotary operates in nearly every country and we take stewardship of our funds seriously.

Financials

Rotary Foundation Expenditures: US$379 million



Rotary International Statements of Activities

For the fiscal years ended 30 June 2024 and 2025 (in thousands of U.S. dollars)

Year to date	June 2024	June 2025
REVENUES		
Dues	$88,303	$93,279
Net investment return	4,383	6,702
Services and other activities	36,968	36,259
Total revenues	**$129,654**	**$136,240**
EXPENSES		
Operating	$93,796	$98,327
Services and other activities	33,337	31,350
Strategic reserve	1,252	1,189
Total expenses	**$128,385**	**$130,866**
Currency exchange (loss) gain	$(3,025)	$1,096
Change in net assets	**$(1,756)**	**$6,470**
Net assets — beginning of year	**$156,450**	**$154,694**
Net assets — end of year	**$154,694**	**$161,164**

Rotary Foundation Statements of Activities

For the fiscal years ended 30 June 2024 and 2025 (in thousands of U.S. dollars)

Year to date	June 2024	June 2025
REVENUES		
Contributions[2]	$351,664	$406,478
Net investment return	110,356	139,961
Split-interest agreements and other activities — net	5,110	4,558
Total revenues	**$467,130**	**$550,997**
EXPENSES		
Program awards	$278,705	$306,124
Program operations	23,830	25,431
Fund development	26,612	27,654
General administration	18,076	20,039
Total expenses	**$347,223**	**$379,248**
Currency exchange (loss) gain	$(7,527)	$2,719
Reserve against pledges receivable	$(1,927)	$(4,111)
Change in net assets	**$110,453**	**$170,357**
Net assets — beginning of year	**$1,333,533**	**$1,443,986**
Net assets — end of year	**$1,443,986**	**$1,614,343**

1. Net of returned funds and other adjustments
2. Per the Generally Accepted Accounting Principles, the Foundation does not report expectancies and fund transfers, including to PolioPlus, as contributions which can differ from other Foundations reports.



WAYS TO LEAVE A LEGACY

The Rotary Foundation

DISTRICT 6450 LEGACY CAMPAIGN

Two Ways to Participate:

1. **A new bequest of $10,000 or more**

2. **An outright gift of $10,000 or more**



EASIEST: A BEQUEST

$10,000 or more

Name TRF as a Beneficiary of a:

- Retirement plan
- Life insurance
- Will

Tell The Rotary Foundation about it

Modify or cancel at any time



NAMED ENDOWMENT

Only earnings are distributed—never principal

Invested as part of the TRF Endowment

EXAMPLE: BEQUEST, ENDOWMENT, SHARE

Suppose you make a …

1. $100,000 **bequest**, establishing your…
2. **Named Endowment**, distributing to the…
3. **SHARE** allocation system

The result?

EXAMPLE: BEQUEST, ENDOWMENT, SHARE

The Result (when you pass):

Your Endowment distributes $4,000 per year on average to SHARE:

- **$2,000 goes to World Fund**
- **$950 goes to District 6450**
- **$950 goes to Downers Grove club as DDF**

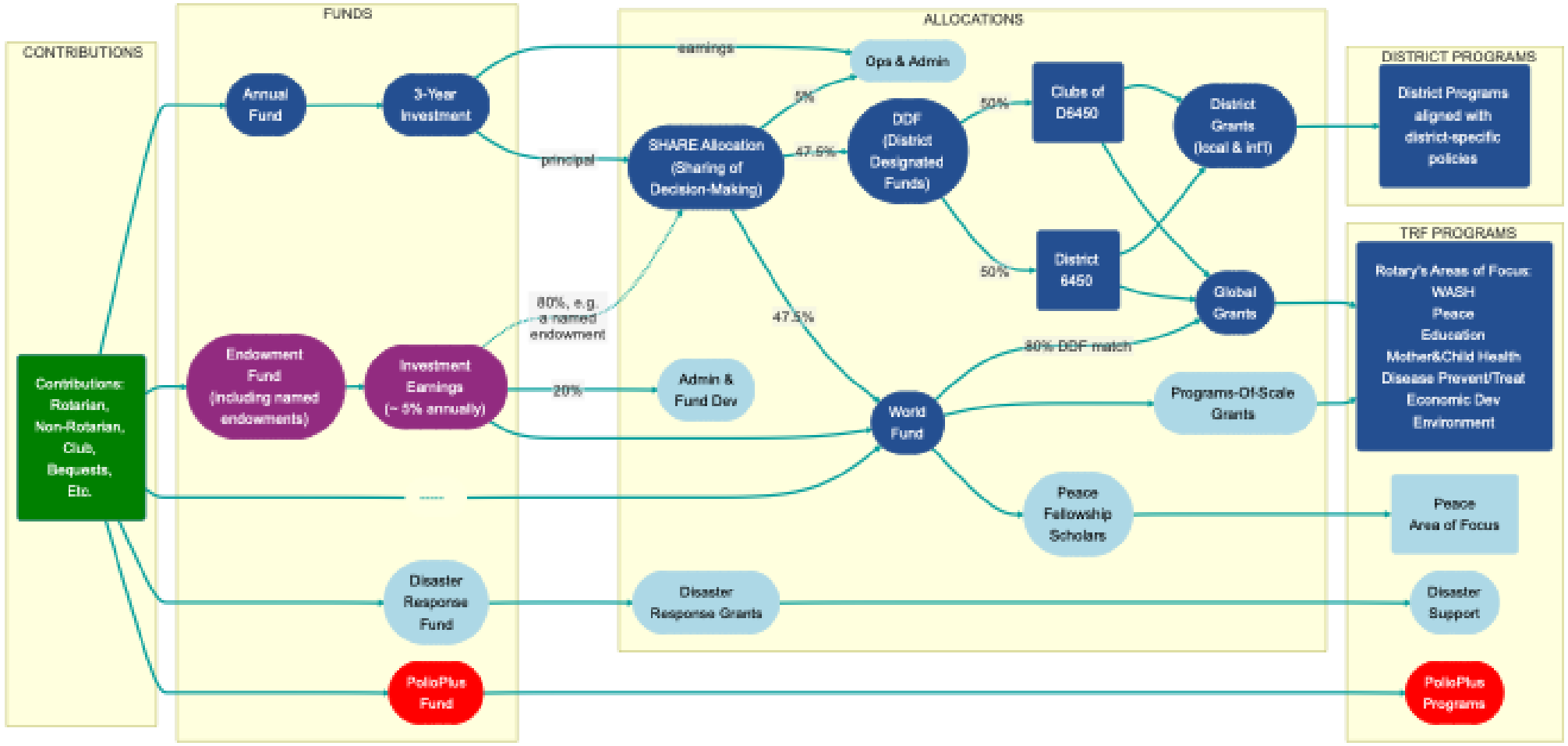
Any return above 5% is reinvested, growing your endowment

EXAMPLE: BEQUEST, ENDOWMENT, SHARE

In other words…

You have set up fellow Rotarians to do good forever, for people who need it most, in increasing measure!

The Rotary Foundation Money Flow - as of 2026-2027



Notes

- District 6450 splits DDF with 50/50 with originating clubs (not every District does this)
- District 6450's DDF policy states: "All Terms and Conditions of The Rotary Foundation apply to each Global and District Grant."
- Endowment fund policy is here: https://www.rotary.org/the-rotary-foundation-endowment-financial-report#endowment-spending
- Fund performances are here: https://www.rotary.org/en/who-we-are/our-finances/rotary-investments
- Financial reports are here: https://my.rotary.org/financial-reports

EXAMPLE: BEQUEST, ENDOWMENT, SHARE

Consider how this gift would affect our global water grant:

1. **$10,000 in DDF is expected to be available from the District**
2. **$4,720 in DDF has come back to our club from prior giving**
3. **$11,760 from 80% DDF match by World Fund for global grants**

Your gift would be reflected in all those places: the District DDF, the club-allocated DDF, the World Fund match.

(And your endowment would be recognized for club & district DDF)

NAMED ENDOWED FUND GROWTH





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