

ROTARY CHARITIES OF TRAVERSE CITY

OPPORTUNITIES FOR PHILANTHROPY



FOUR-WAY GIVING THROUGH ROTARY

By channeling your philanthropic legacy through Rotary, you can be sure that your contribution will be nurtured and preserved by caring Rotarians and a rigorous review process, thus providing lasting and significant support to our global and local communities.

Annual & Planned Giving Through Rotary International

The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill and peace through the improvement of health, the support of education and the alleviation of poverty. With more than \$637 million in assets, Rotary International awarded more than \$91 million in 2006 for Polio Plus, education and humanitarian aid worldwide.

www.rotary.org

Planned Giving Through The Rotary Fund at the GTRCF

The Rotary Fund is a philanthropic endowment fund established by Rotary Charities at the Grand Traverse Regional Community Foundation. Its mission is to strengthen the good works of Rotary Clubs by increasing service, philanthropy and volunteerism in our home communities through service projects and around the world through Rotary International.

www.gtrcf.org

Annual Giving Through TC Rotary Club Projects

Rotary strives to achieve its objective of “Service above Self” through activities in our Four Avenues of Service. Within each of these avenues, there are multiple opportunities to give of your time, talent and treasure. Rotary Camps & Services provides fiscal oversight for funds donated for Rotary Club projects in:

- Club Service
- Vocational Service
- Community Service
- International Service

www.traversecityrotary.org

Four-Way Giving

Globally:

Rotary International

Locally:

Rotary Charities

Rotary Fund

Rotary Club Projects

The two foundations—
The Rotary Foundation
of Rotary International
and Rotary Charities
of Traverse City—are
complementary, one
to the other, and
both are worthy of
support by all Traverse
City Rotarians.

PLANNED GIVING THROUGH ROTARY CHARITIES

The mission of Rotary Charities is to improve the well-being of the five-county Grand Traverse region through challenge and matching grants, promoting philanthropy and sustainability while leading proactive initiatives that demonstrate innovation, collaboration and measurable outcomes.

Rotary Charities will accept unrestricted gifts, including cash, stock, memorial and honorarium gifts, appreciated property bequests or planned gifts in order to increase the assets of the Rotary Charities portfolio and further its charitable activities.

For more information

Rotary Charities
of Traverse City

231.941.4010

msmith@rotarycharities.org

www.rotarycharities.org





THE VISION

Rotary Charities will be a high impact public foundation that promotes philanthropy and leads positive change in our region by providing resources and volunteers based on the Rotary principles of: Service, Fairness, Integrity, Equity and Goodwill. The Foundation will exist into perpetuity by adhering to a disciplined spending and growth policy.

THE CHALLENGE

Since striking oil in 1976, Rotary Charities has been able to operate with minimal overhead costs and grant an average of \$1.2 million annually to nonprofits in the Grand Traverse region. As of June 30, 2007, total assets stand at nearly \$48 million. However, gas and oil revenues that have built that endowment are quickly on their way to an inevitable end. In the near future, the only way our assets will be able to grow is through return on our investments. This means that if we spend 4.5% annually and invest prudently, we can expect the portfolio to grow by only 1-2% beyond inflation on a yearly basis. We are sure that the gap between community need and our grants budget will only continue to widen under this scenario.



Our historic source of consistent growth—gas and oil royalties—will soon be coming to an end.

THE IMPACT

Keeping in mind that the return on investment from our portfolio will not keep up with the increase in funding requests, we asked ourselves: “How will we best meet our dual goals of being responsive to community need while still ensuring these financial resources are available into perpetuity?”

The most obvious answer is to grow our corpus, which in turn increases the amount invested back into the community’s nonprofits. Based on current returns and spending policy, a corpus of \$55 million would provide approximately

\$2 million annually. This means almost \$800,000 additional dollars available annually for grantmaking! The resulting grants would support a strengthened nonprofit sector that can deliver better essential services to our community... more educational and cultural choices... more recreational opportunities for our youth.

The Foundation will exist into perpetuity by adhering to a disciplined spending and growth policy.

THE BENEFITS

There are numerous benefits to including Rotary Charities in your estate planning:

- Rotary Charities has a proven, 30-year track record of making high-impact, community-responsive grant decisions
- The Board of Rotary Charities operates by a disciplined spending policy, striving for healthy growth while minimizing risk, and at all times protecting the assets for future community needs
- Grants are awarded based on Rotary Principles, and the process is carried out with integrity, transparency and thoughtful due diligence

- By integrating your resources with Rotary’s, your legacy will be a continuation of Rotary values and ideals

Rotary is not attempting to compete directly with the nonprofits we serve. Conversely, we are looking to those who know us well to consider a long-term investment in Rotary Charities, knowing that it will ultimately mean greater financial resources for a broad spectrum of nonprofits in the community.



The Great Lakes Children’s Museum, part of the Rotary-funded Grand Traverse Bay Alliance.

ROTARY CHARITIES OF TRAVERSE CITY

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MORE INFORMATION AND LINKS
TO RESOURCES ARE ONLINE:
WWW.ROTARYCHARITIES.ORG

Core Ideology

Rotary Charities' Core Ideology is rooted in our Articles/Bylaws and Core Rotary Values. Our Articles and Bylaws state that we were established to benefit organizations that serve charitable, scientific, literary and educational purposes.

Core Values

Our Rotary core values are based in service to the community, with high ethical standards that respect the dignity of each individual and call for the practice of honesty, fairness, understanding, innovation and cooperation in order to improve the quality of life.

Mission

The mission of Rotary Charities is to improve the well-being of the five-county Grand Traverse (MI) region through challenge and matching grants, promoting philanthropy and sustainability while leading proactive initiatives that demonstrate innovation, collaboration and measurable outcomes.



YES, I'D LIKE ADDITIONAL INFORMATION

To receive personalized information regarding the benefits you could expect from a planned gift to Rotary Charities, please complete and return this form via fax, mail or e-mail to msmith@rotarycharities.org

All inquiries will be kept confidential.

I am interested in learning more about the following opportunities:

- Gift to Rotary Charities
- Gift to Rotary International
- Gift to The Rotary Fund
- Attending a Rotary-focused estate planning workshop

Name _____

Address _____

City/State/Zip _____

Daytime Phone _____

E-mail _____

Preferred method of contact: phone e-mail mail

