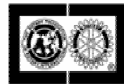


EVERY
ROTARIAN



EVERY
YEAR

Goal Setting



THE ROTARY FOUNDATION
**2007-08 FUND DEVELOPMENT
CLUB GOAL REPORT FORM**

EN—(906)

EVERY
ROTARIAN
EVERY
YEAR

(Please return completed form to your district governor-elect by 1 May 2007)

Club Name (please print)	Club Number	
Country	District	
2007-08 Club President's Name (please print)		
2007-08 Club President's Signature		
Telephone	Fax	E-mail

ANNUAL PROGRAMS FUND GOAL

Your Annual Programs Fund contributions support humanitarian, educational, and cultural programs both locally and internationally. Personal outright contributions, club fundraisers, and other sources are encouraged to achieve club goals.

Calculate your club's Annual Programs Fund goal by multiplying the number of members in your club by a per capita figure appropriate to your club.

OF 2007-08 CLUB MEMBERS: _____

AVERAGE AMOUNT PER MEMBER: US\$ _____

2007-08 APF-SHARE GOAL: US\$ _____

(Club members x per capita goal)

PERMANENT FUND & MAJOR GIFTS GOALS

Indicate the number of club members interested in making an outright gift of US\$10,000 or more and those interested in including the Permanent Fund in their estate plan.

Number of new Major Gifts:
(US\$10,000 or more outright) _____

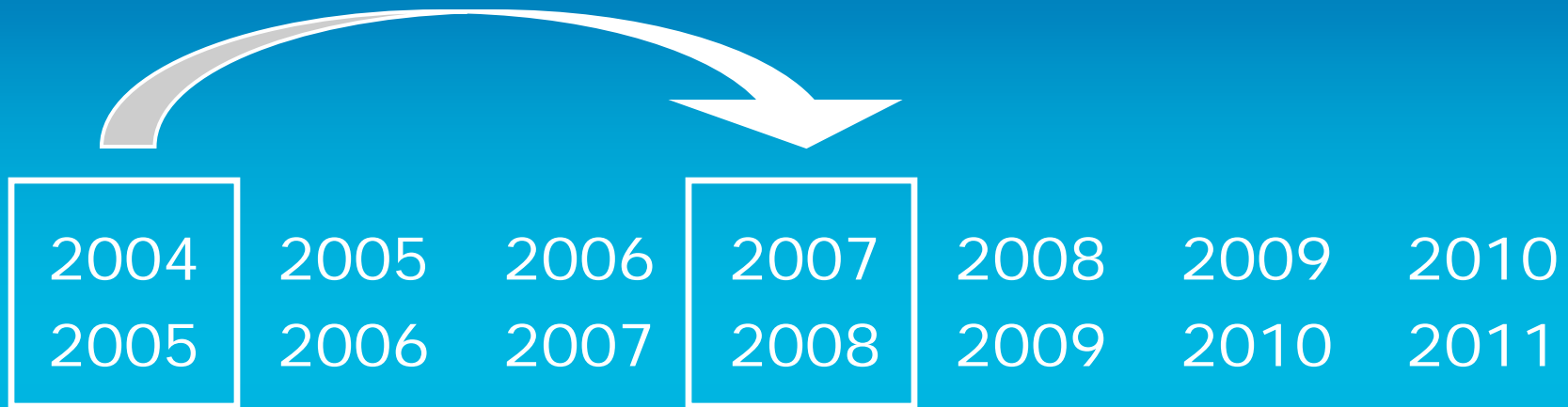
Number of new Benefactors:
(Minimum US\$1,000 outright gift or commitment in estate plan) _____

Number of new Bequest Society Members:
(Minimum US\$10,000 commitment in estate plan) _____

Our Mission

Enable Rotarians
to advance world understanding,
goodwill and peace
through the improvement of health,
the support of education,
and the alleviation of poverty.

The APF/SHARE 3-Year Cycle



- Contributions made to the Annual Programs fund in 2004-05 become available in 2007-08
- Contributions made in 2007-08 become available in 2010-11

Your Contribution at Work



Permanent Fund earnings
also support the World Fund

50% – District Designated Funds

- Matching Grants
- District Simplified Grants
- Ambassadorial Scholarships
- Rotary Centers
- Extra GSE Teams
- University Teacher Grants

50% – World Fund

- 3-H Grants
- One GSE Team per District each year
- Matching Grants (matches district and club input)
- Volunteer Service Grants

Benefactor Recognition

A **Benefactor** is an individual or couple that has made a provision in their estate plan to gift a minimum \$1,000 to The Rotary Foundation.

Your legacy will make a lasting difference in the world

The Permanent Fund builds long-term stability for the future of The Rotary Foundation of Rotary International by providing an extra source of income to meet an increasing demand for the Foundation's educational, demonstration, and cultural programs. By making your bequest to our Permanent Fund, you are helping to improve and enrich lives of people around the globe.

A Benefactor of The Rotary Foundation is someone who has made a provision in their will to gift a minimum of \$1,000 to the Permanent Fund. A Benefactor of The Rotary Foundation is someone who has made a provision in their will to gift a minimum of \$1,000 to the Permanent Fund.

The Rotary Foundation appreciates information about our commitments from which it will benefit in the future. We recognize the highly personal nature of these commitments. Only in rare cases will a beneficiary from your Benefactor recognition will be used to secure that person's Personal Award in the Benefactor Program. Please follow the steps of your Benefactor recognition for your gift and for your permission to publish your name as a Benefactor in our program in any appropriate way.

Rotary.org 149-EN (2015)

BENEFACTOR GIFT COMMITMENT

I expect my gift will amount to US\$ _____
(Must be a minimum of \$1,000.00 to meet our minimum gift requirement to the Permanent Fund. Additional information on the donor's legacy can be obtained by contacting Rotary.org)

My Benefactor commitment to The Rotary Foundation's Permanent Fund will be in the form of:
 Will-Bequest Charitable gift Other (please specify) _____

I designate that the spending portion of my gift will be applied to:
 in the Trustee's discretion (World Fund) through SIFAM (Special Designated Fund and World Fund)
(Must be approved by the trustee of the fund in the event of a dispute. SIFAM is not required to be used in all cases.)

Name _____ Rotary Club _____
Address _____ Date _____
City/State _____ Zip _____ Date of Birth _____
Please return the lower portion of this card to us at an appropriate address listed on reverse side.



Benefactor Commitment Card: 149-EN

The Bequest Society

Bequest Society member is an individual or couple that has made a provision in their estate plan to gift a minimum \$10,000 to TRF.

Yes, I am willing to become a member of The Rotary Foundation Bequest Society.

Name(s) _____
(Please print your name in personal or legal name)

This is a (POTENTIAL) bequest and this person's name should appear on the report.

Address _____
_____ (City, state and zip code)

District _____ Rotary Club _____

Date(s) of Birth _____ (month) _____ (year)

Telephone (Home) _____ (Business) _____ (Mobile) _____

I designate that the spending portion of my gift will be applied:
 to the General Rotation (World Fund) to the AMASS (Worldwide Rotaract & World Fund)
 to the Children's Fund (World Fund)

My Bequest will be funded by:
 Cash Bond Mutual Investment Account Life Insurance
 Other (Specify) _____

Amount of Bequest (in _____ % and/or US\$) _____ to The Rotary Foundation.
(Please attach the completed amount to accompany this report.)

Yes, The Rotary Foundation may publish my name in our compilation.
 No, I would like my name published in our compilation (including regional and national compilations).
 I do not wish to be included in any _____ (State) _____ (Country) _____ (City) _____ (Rotary Club) _____ (Rotary District) _____ (Rotary Region) _____ (Rotary International) _____ (Rotary Foundation).

Signature _____ Date _____
Signature _____ Date _____

*The Rotary Foundation agreement requires a trust arrangement from which it will benefit in the future. It requires the highly personal nature of their commitment and asks that the details of your commitment will be kept confidential.



Bequest Society Membership Card: 098-EN

Paul Harris Fellow

- The "magic" number for a PHF is 1000
- It can be **US\$1000**, **1000 Recognition Points** or a combination of both

