

Owensboro Rotary Club *The 1915 Society*

Named for the year in which Owensboro Rotary Club was founded, *The 1915 Society* was created to recognize those individuals whose estate planning includes a gift to the Owensboro Rotary Club Foundation. Often called the ultimate gift, because it many times is accomplished after an individual's lifetime, a bequest ensures that the donor's wishes are carried out to make a gift which will benefit needy beneficiaries of the future. Of course, a lifetime gift and pledge also fully qualifies a donor for this recognition.

The 1915 Society provides a unique opportunity for you to partner with other Rotarians during your lifetime and to plan for the future at the same time. Joining *The 1915 Society* is as simple as completing a Statement of Intent form.

Leaving a Legacy

Leaving a Legacy enables you to maximize the benefits of philanthropy while completing your financial and estate planning. Recognizing that different people have different financial and estate planning needs, Owensboro Rotary Club Foundation volunteers will work with you and your advisors to help develop the best plan for you.

Creating a meaningful and financially sound estate plan is of critical importance to all of us regardless of the size of our estate. It is our final opportunity to assure that our wishes are carried out with regard to the assets we have accumulated during our lifetimes, our family's future and the future viability of the charitable organizations we care about and have supported during our lifetime.

Bequests

Bequests may be created by Will or by Revocable and Irrevocable Trusts, and may be designated in a number of ways. They may be funded by a specific amount of money, a percentage of your estate, or a particular asset, such as stocks or real estate. The Owensboro Rotary Club Foundation may be named as a recipient of all or part of your estate, or a contingent beneficiary in the event that your beneficiaries do not outlive you. To join *The 1915 Society* donors complete a Statement of Intent form with the Foundation and retain a copy for use in discussion with their attorney and with their estate documents.

Split Interest Gifts

Another option is to consider a split-interest gift; this can be an excellent way for someone to supplement their income during retirement. Or you may wish to provide for a loved one after your death. In these examples, a charitable remainder trust or gift annuity may help you maximize the benefits of philanthropy for you and your family, and creating these types of gift arrangements would enable you to join *The 1915 Society*. For more information, please contact your Club President.

Lifetime Gifts and Pledges

Of course, a lifetime gift or pledge is a wonderful and immediate way of benefiting the Foundation and your Club President will help you to decide about the best way to do this. This fully qualifies you to join **The 1915 Society**.

Owensboro Rotary Club Foundation is a non-profit, tax-deductible organization in Owensboro, Kentucky