

LEVERAGING OUR RESOURCES TO STRENGTHEN OUR COMMUNITY

As Rotarians we are committed to the value of Service Above Self and offer our time, talent, and treasure to improve the quality of life in our community and the world.

Each of us is important. Each of us has an impact through the work that we do and the generous gifts that we make. Yet it is when we work together and pool our resources that we are able to achieve goals that may seem impossible to achieve otherwise. This is why the Rotary Club 29 Foundation exists.

The passion and generosity of our members is extended through Foundation gifts to local non-profit organizations, schools, youth organizations, scholarships, community beautification projects, district and international service projects and other special programs, having a broad and powerful impact on the quality of life in our community and the world. Each Rotarian, through his or her involvement and generous philanthropy, is at the heart of the Foundation's mission and work. What we do with Rotary changes lives in meaningful ways and fosters goodwill.

We hope that every Rotarian in our Rotary club will take advantage of the opportunity to participate in the Rotary Club 29 Foundation and help to grow and sustain the foundation's many wonderful programs. The generous support we receive from our members sustains families, eradicates disease and improves health, feeds the hungry, educates children and adults and fosters international understanding.

All contributions to the Rotary Club 29 Foundation ensure a better future for everyone. Please consider how much more we can accomplish with your support. The Foundation looks to its membership to continue its charitable practices for those purposes that are within the scope of Rotary interests. A major gift to the foundation, today or through planned giving, can ensure our good work continues for generations.

HISTORY OF ROTARY CLUB 29 FOUNDATION

During the term of Club 29 President Val Adams, the Rotary Club of Oklahoma City established the Oklahoma City Rotary Foundation, Incorporated, in 1956-57. The Foundation was established for gift tax purposes. The following year, Club 29 President Ed Leslie was elected the first President of the Foundation, on March 31, 1958. For many years, gifts to the Foundation funded Club 29's Annual Christmas Project. In 1989, under the leadership of President Steve Garrett, the Foundation's by-laws were updated and an emphasis on establishing an endowment was begun.

In 1991, Rotarian John Kirkpatrick issued a challenge grant of \$25,000 to establish a Designated Fund at the Oklahoma City Community Foundation. The Foundation is the beneficiary of this Designated Fund held by the Oklahoma City Community Foundation. The OKCCF distributes a portion of these funds annually, while permanently maintaining the corpus to support the long-term needs of the Club 29 Foundation. Donors who prefer this method of giving are encouraged to support the Club 29 Foundation through gifts to this Designated Fund.

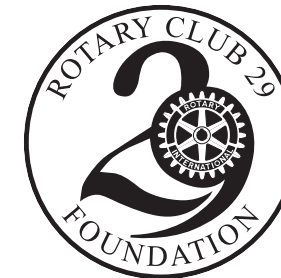
In May of 1995, the Rotary Club 29 Foundation created a Disaster Relief fund to benefit the victims of the Alfred P. Murrah Federal Building bombing. By June 30, 2002, the fund had grown to nearly \$545,000 with donations received from as far away as Japan, Canada, Israel, Denmark and Australia. Over \$500,000 was disbursed to victims of the Murrah Building bombing and their families. In October 2001, the Foundation provided \$120,000 including the \$85,660.09 balance of the Murrah Building bombing Fund to benefit survivors of the 9-11-01 Pentagon and World Trade Center terrorist action.

In 2005, the Foundation became the beneficiary of a trust created under the will of former Club 29 member Alfred C. Leonhardt, resulting in the largest single gift to the Foundation.



2006 Annual Project: Food Bank distribution trailers

In addition to checking with your attorney, accountant or other advisors, you may contact the Rotary office to learn more about these and other giving opportunities.



ROTARY CLUB 29 FOUNDATION, INC.

The mailing address of the Foundation is:

Rotary Club 29 Foundation, Inc.
c/o Shirley Kirschner
Rotary Club of Oklahoma City,
119 N. Robinson, Suite 360
Oklahoma City, OK 73102

For More Information, call

(405) 235-5100
FAX (405) 236-1208
or email:
rotary29@okcrotary.com



TOGETHER WE CAN
MAKE A DIFFERENCE

SUPPORTING PHILANTHROPIC ACTIVITIES OF THE ROTARY CLUB OF OKLAHOMA CITY

The mission of Rotary Club 29 Foundation is “to support the philanthropic activities of the Rotary Club of Oklahoma City.” The Foundation is independent from the club, but it does not solicit or accept funding requests other than from the club. Funding decisions are ultimately made by the Foundation board.

Rotary Club 29 Foundation generally supports four types of projects:

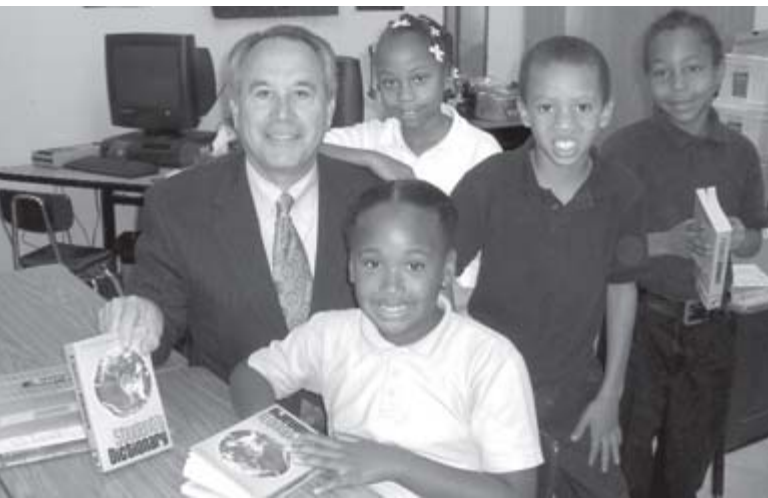
1) The Foundation accepts and distributes donations from club members designated for specific purposes, such as the annual club Project, weekly pocket change donations for specific purposes, Paul Harris Fellowship donations, and donations to The Rotary Foundation through Every Rotarian-Every Year.

2) The Foundation accepts grant requests made by the club for both international and domestic service projects, including projects in the Oklahoma City area.

3) The Foundation maintains a disaster relief fund, which is used to provide matching grants for disaster relief that are supported by club members.

4) The Foundation works with individual donors of restricted funds to assist them meet their long-term objectives.

Furnishing Dictionaries to OKC 3rd Graders



Kitchen - Boys & Girls Club 2003 Rotary Project \$48,500

FREQUENTLY ASKED QUESTIONS: WHO GOVERNS ROTARY CLUB 29 FOUNDATION?

The Foundation is governed by a board of directors of the Foundation that is comprised of fifteen total directors, including six directors from club leadership and nine at-large directors who do not serve on the club board. Three of the at-large directors are elected by members of the club. Twelve of the directors serve three year staggered terms.

HOW CAN I MAKE A GIFT TO THE FOUNDATION?

The Foundation is non-profit and gifts to the Foundation are generally tax deductible. Outright gifts of money or assets are the most familiar, and perhaps the easiest method of giving. A current gift has advantages for the donor and the Foundation in that you have the satisfaction of making a current gift and responding to an immediate need, and this type of gift is generally easy to arrange. Contributions to the Foundation make also be made through your estate plan. This can be accomplished by designating a fixed dollar amount of cash or a personal asset, a percentage of your estate or all of the residue from your estate to the Rotary Club 29 Foundation, Inc., upon your death.

WHAT TYPE OF GIFTS CAN I MAKE TO THE FOUNDATION?

The Foundation accepts cash and, subject to

board approval, stocks, bonds, life insurance, real estate and other personal property. The Foundation board will work closely with any donor who wishes to place restrictions on any gift so they are consistent with the purpose of the Foundation and the desires of the donor. Gifts may be made in recognition or in memory of loved ones or special friends. There are three common ways to give life insurance to the Foundation. You can give a fully paid-up life insurance policy which you already own. You can give a life insurance policy upon which premiums remain to be paid. Or, you can retain ownership of a policy but name the Rotary Club 29 Foundation, Inc., as the beneficiary.

WHO MANAGES THE FOUNDATIONS ASSETS?

Foundation assets are managed by professional investment managers, subject to oversight by the Foundation’s investment committee and board of directors. Unrestricted assets that are not necessary for short-term purposes are invested in a balanced account of equities and debt instruments and are subject to distribution only in accordance with the Foundation’s Spending Policy. The Spending Policy is designed to provide an appropriate level of support for current club projects, while protecting assets from inflation and providing a long-term source of support for the Club’s philanthropic activities.

ARE DONORS RECOGNIZED FOR THEIR GIFTS TO THE FOUNDATION?

The Rotary Club 29 Foundation recognizes significant gifts by naming as a Community Fellow any individual who donates \$1000, and by naming as a Community Benefactor any individual who makes a deferred gift of \$1000 or more, by will, trust, insurance policy or other methods of deferred giving. Donations at any level are acknowledged by a thank-you letter to the donor. Gifts in recognition of or in memory of another person are also acknowledged to that person or their family respectively.

SUGGESTED LANGUAGE FOR GIFTS TO THE FOUNDATION

Sample Language:

1) Bequest in a Will: I give, devise and bequeath to the ROTARY CLUB 29 FOUNDATION, INC., an Oklahoma non-profit corporation, (insert here the sum or description of property) to be used for the benefit of The Rotary club of Oklahoma City (“Club 29”) in such manner as the board of directors thereof may direct.

2) Gift in a Trust: I hereby direct the Trustee to distribute the sum of \$_____ (or designate specific property) to the Rotary Club 29 Foundation, Inc., an Oklahoma non-profit corporation, to be used for the benefit of The Rotary Club of Oklahoma City (“Club 29”) in such manner as the board of directors thereof may direct.

3) Assignment of Stock: FOR VALUE RECEIVED, the undersigned does hereby sell, assign and transfer unto the Rotary Club 29 Foundation, Inc., an Oklahoma non-profit corporation, to be used for the benefit of the Rotary Club of Oklahoma City (“Club 29”) in such manner as the board of directors thereof may direct, all my right, title and interest in and to _____ shares of the common stock of _____, a _____ corporation (the “Corporation”), standing in the name of (insert name)_____ on the books of said corporation, represented by Certificate No. _____ herewith, and does hereby irrevocably constitute and appoint the officers of said Corporation as attorney to transfer the stock on the books of the within named Corporation with full power of substitution in the premises. In witness whereof, I have signed this Assignment this ___ day of _____, 20__.

_____ Signature line for Donor _____

4) Beneficiary Designation for Insurance Policy, IRA Account, ETC: I hereby designate the Rotary Club 29 Foundation, Inc., an Oklahoma non-profit corporation, as the primary beneficiary of _____ to receive such proceeds upon my death and to use for the benefit of the Rotary Club of Oklahoma City (“Club 29”) in such manner as the board of directors thereof may direct.

TOGETHER WE CAN MAKE A DIFFERENCE