



How to make a testamentary bequest to the Bellevue Rotary Legacy Fund of the Bellevue Rotary Foundation

If you have any questions about leaving a bequest, please contact us for assistance. If you have decided to include a bequest to the Bellevue Rotary Legacy Fund (Legacy Fund) as part of your estate plan, please take the time to let us know. We would like to recognize you and your family for your generosity. If you prefer, the bequest can be listed as “Anonymous.”

It is a two-step process to make a testamentary gift to the Legacy Fund:

1. Include a specific bequest in your will/revocable trust and/or a beneficiary designation on your IRA/retirement account, life insurance policy, or annuity contract.
2. Notify the Foundation of your bequest and who will be your Trustee or legal advisor and their contact information. The dollar amount or percentage does not need to be disclosed in the notification.

It is important to include the name of the Legacy Fund as well as the Foundation’s EIN in the specific bequest in your will. You can make the gift by adding it to your will when you are revising your estate planning, or you can execute a codicil (amendment) to your existing will, which adds the gift without requiring a new will.

Below is some example language for a specific bequest (intended for review with your estate planning or qualified legal advisor):

A. As a percentage of your net estate:

Bequest to Bellevue Rotary Club: I give the amount of _____ percent (____.%) of my net estate to the Bellevue Rotary Legacy Fund of the Bellevue Rotary Foundation, located in Bellevue, Washington, EIN 91-1501333.

B. As a percentage of your net estate, but with a specified maximum cap, not to exceed dollar amount:

Bequest to Bellevue Rotary Club: I give the amount of _____ percent (____.%) of my net estate, but not to exceed _____ Dollars (\$_____), to the Bellevue Rotary Legacy Fund of the Bellevue Rotary Foundation, located in Bellevue, Washington, EIN 91-1501333.

C. With shares of marketable securities

Contact us for the Legacy Fund account electronic transfer information and remind your broker to include your name and contact information with your transfer. If you hold securities in certificate form, you will need to mail two envelopes separately to complete your gift. In the first envelope, place the unsigned stock certificate(s). In the other envelope, include a signed stock power for each certificate. You may obtain this power from your broker or bank. Please remember to use certified mail.

Gift Acceptance Policy: Unless approved by the Foundation Board, the Legacy Fund will accept only gifts of cash and marketable securities.

Named Endowments: Unless approved by the Foundation Board, named endowments will not be accepted unless the named endowment contributions are donated without restrictions as to investment or use.

Background Information:

The Bellevue Rotary Foundation (Foundation) is a qualified Washington State registered 501(c)(3) not-for-profit organization. The Bellevue Rotary Legacy Fund was established by a Bellevue Rotary Foundation Board of Directors Resolution on October 13, 2010. It is managed by the Foundation's Board of Trustees, following governance procedures that include regular performance reviews and the use of professional investment advisors. The purpose of the Legacy Fund is to provide a source of long-term funding for charitable grant projects and programs sponsored and supported by the Rotary Club of Bellevue ("BRC") in the Bellevue, Washington community and elsewhere.

There are three broad categories of organizations and activities that receive Foundation grants:

1. **Community Grants Program:** provide donations and funding to various charities and educational organizations providing services to residents in need primarily on the Greater Eastside of Lake Washington. The Bellevue Foundation has contributed over one million dollars and countless volunteer hours to organizations in the Bellevue community since it was established in 1990. Additionally, the Bellevue Foundation contributed directly to the building of Inspiration Playground at the Bellevue downtown park. Inspiration Playground is an inclusive outdoor play environment designed for children and families of all ages and abilities.
2. **World Community Service:** The Bellevue Foundation also participates in a broad range of humanitarian, intercultural and educational activities designed to improve the human condition. Humanitarian grants support projects that provide health care and medical supplies, clean water, food, job training, youth development, and education to millions of people in need, particularly in the developing world. The Foundation also provides numerous grants each year to fund the work of the Rotary Club of Bellevue volunteers, where their technical expertise and knowledge are most needed to alleviate hardship and solve problems. In addition, the Foundation builds understanding through international scholarships, exchange programs and humanitarian grants.
3. **Vocational Service Grants:** This innovative program provides donations and funding for youth scholarships, Rotary youth exchange programs, vocational service awards, two Rotaract clubs, and Partners for Work, which assists people who are over 18 years of age who have developmental disabilities and want to work.

Contact Information:

Club Administrator
The Rotary Club of Bellevue
PO Box 523
Bellevue, WA 98009

Phone: (425) 998-7542

E-mail: clubadmin@bellevuerotary.net and legacyfund@bellevuerotary.net

Federal Tax Id (EIN): 91-1501333