How your gift is used

The RFUK trustees take great care to ensure that your wishes are met. Any bequest to RFUK for its general charitable purposes will be designated for the benefit of the Endowment Fund of The Rotary Foundation. Gifts to this endowment fund are invested in perpetuity. Unless you specify otherwise, the income will be directed for benefit of The Rotary Foundation World Fund and used where the need is greatest.

All other legacies for a specified purpose are applied accordingly.

Adding a Codicil to an existing Will

If you already have a Will, it is easy to add or amend any terms of the Will by attaching a Codicil.

Preparing for your solicitor

We suggest that you consider the following points before you talk to your solicitor:

- Work out what is the likely value of your estate and how much you will have available for gifts.
- Decide who will be your executors.
- Make a list of the people and charities that you would like to leave money or gifts to.

It is also recommended to include the following clause, whichever wording you use:

If at my death any charity named as a beneficiary in this Will or any Codicil hereto has changed its name or amalgamated with or transferred its assets to another body then my Executors shall give effect to any gift made to such charity as if it had been made (in the first case) to the body in its changed name or (in the second place) to the body which results from such amalgamation or to which such transfer has been made.

Please remember to use the full name of RFUK – Rotary Foundation of the United Kingdom - and the correct charity number and registered address.

Adding a Codicil to an existing Will

If you already have a Will, it is easy to add or amend any terms of the Will by attaching a Codicil. If you decide that you would like to make a Codicil to include Rotary Foundation of the United Kingdom in your Will, you should consult a solicitor about the precise wording to be used. The same wording as for a gift in a Will (see suggested wording above) can be used for a typical Codicil, with the additional suggested wording:

In all other respects, the provisions of the previously executed Will remain in effect.
Leaving a legacy to RFUK

Who – Anyone can leave a gift in their Will to RFUK and it can be for a small amount of money. Every donation made in this way is a valued contribution to our work.

Why – Make a lasting gift that ensures our vital work can continue. Any bequest left to RFUK is free of inheritance tax.

How – Include the details of your gift in your Will, to guarantee that your wishes are followed. We recommend using a solicitor to ensure the details are valid and accurate.

Tax planning is becoming more important as the value of family homes increases. An increasing number of estates fall within the Inheritance Tax regulations and a lack of planning can significantly increase estate tax liabilities.

Why we need your gift

Since it was established in 1990, RFUK has been supporting the work of The Rotary Foundation and helps to fund many programmes and projects that aim to improve the lives of others throughout the world. Many of these projects are run by individual or groups of Rotary clubs, which provides a personal connection with the communities involved, whether local or international.

Funding for the programmes is dependent on donations from Rotarians, their clubs and the general public, and demand for the Foundation’s educational, humanitarian and cultural programmes continues to grow. By remembering RFUK in your Will, you will help to ensure that the work of the Foundation will continue beyond your lifetime. The Foundation has a long established commitment to projects throughout the world and needs your help to continue its work.

Privacy Statement - Your Personal Information

Rotary Foundation of the United Kingdom (RFUK) is an associate Foundation of The Rotary Foundation (TRF) of Rotary International Evanston, USA. RFUK collects personal information about you to record your intended donation. Some of your personal information is shared with The Rotary Foundation/Rotary International for the maintenance of donation records. You will be able to view your donation records online via Rotary International services (account set up required). Your information will be processed in accordance with the Rotary privacy statements. RFUK will not sell, trade or share your personal information with non-Rotary third parties nor will it send you mailings on behalf of other unrelated organisations. Details of the full privacy statements are available on our website rotarygbi.org/donate or copies can be requested at: RFUK, Kinwarton Road, Alcester, Warwickshire, B49 6PB, Email: rfuk@rotarygbi.org