

## Suggested wording for your Will

The law requires very precise wording in your Will to avoid any misunderstanding. The following wording could be used if you would like to leave a gift in your Will to RFUK:

### For a pecuniary or specific legacy

I give the sum of £xxx (or the item specified) to Rotary Foundation of the United Kingdom (registered charity number 1002059) of Kinwarton Road, Alcester, B49 6PB for its general charitable purposes (or specific Foundation programme) in such manner as the trustees may determine. I further direct that the receipt of the Secretary or other authorised officer for the time being of the charity shall be a full and sufficient discharge for this legacy.

### For a residuary legacy

I give all (or xxx% share) of the residue of my real and personal estate which I can dispose of by Will in any manner I think proper to Rotary Foundation of the United Kingdom (registered charity number 1002059) of Kinwarton Road, Alcester, B49 6PB for its general charitable purposes (or a specific Foundation programme) in such manner as the trustees may determine. I further direct that the receipt of the Secretary or other authorised officer for the time being of the charity shall be a full and sufficient discharge for this legacy.

### 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.

### 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.



Rotary Foundation  
of the United Kingdom

Rotary Foundation of the United Kingdom,  
Kinwarton Road, Alcester, Warwickshire, B49 6PB

Take Action: [rotarygbi.org](http://rotarygbi.org)



# YOUR ROTARY LEGACY

*Doing good in the world  
beyond your lifetime*



Rotary Foundation  
of the United Kingdom

Charity number 1002059

June 2021



# Rotary's tomorrow depends on what we do today

## Rotary Foundation of the United Kingdom (RFUK)

RFUK is an Associate Foundation of The Rotary Foundation of Rotary International. RFUK supports the aims of The Rotary Foundation by providing funding for its programmes, which cover amongst other things the seven main areas of focus:

- Peace and conflict prevention/resolution
- Maternal and child health
- Disease prevention and treatment
- Basic education and literacy
- Water and sanitation
- Economic and community development
- Supporting the Environment

## 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.

**Return this form and any supporting documents you wish to share to:**

Rotary Foundation of the United Kingdom, Kinwarton Road, Alcester, Warwickshire, B49 6PB

**Yes, I/we have made a commitment to the Rotary Foundation of the United Kingdom in my estate plan.**

Names(s) \_\_\_\_\_

Address \_\_\_\_\_

Tel \_\_\_\_\_

Email \_\_\_\_\_

If applicable: The Rotary Club of \_\_\_\_\_

District \_\_\_\_\_

**I/we designate that the spending portion of the gift to the Endowment Fund will be applied:**

- ☐ at the Trustees' discretion (World Fund)  
☐ through SHARE (World Fund and District Designated Fund)  
☐ to the Rotary Peace Centers

**Or to one or more of the seven areas of focus.**

- |   |   |
|---|---|
| <input type="checkbox"/> Peace and conflict prevention/resolution | <input type="checkbox"/> Basic education and literacy       |
| <input type="checkbox"/> Disease prevention and treatment         | <input type="checkbox"/> Economic and community development |
| <input type="checkbox"/> Water and sanitation                     | <input type="checkbox"/> Supporting the Environment         |
| <input type="checkbox"/> Maternal and child health                |   |

**The amount to RFUK will be** £ \_\_\_\_\_

The anticipated amount is necessary to determine recognition.

- ☐ I have read & accept the privacy statement below.  
☐ Please do not list my name in any publication.

Signature \_\_\_\_\_

Signature \_\_\_\_\_

Remember to consult independent tax and/or legal advisers before making any charitable gift. If you would like to know more about giving options, please consult with your district Rotary Foundation chair, or you may email us at [rfuk@rotarygbi.org](mailto:rfuk@rotarygbi.org) or call 01789 765 411

## 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](https://rotarygbi.org/donate) or copies can be requested at: RFUK, Kinwarton Rd, Alcester, B49 6PB, Tel: 01789 765411, Email: [rfuk@rotarygbi.org](mailto:rfuk@rotarygbi.org)