

ROTARY'S ENDOWMENT SECURING OUR FUTURE

Matti Honkala
E/MGA Zone 15



WHAT IS THE ENDOWMENT FUND?

- Contributions are not spent but rather invested in perpetuity.
- The investment earnings used to support Rotary Foundation grants and programs.



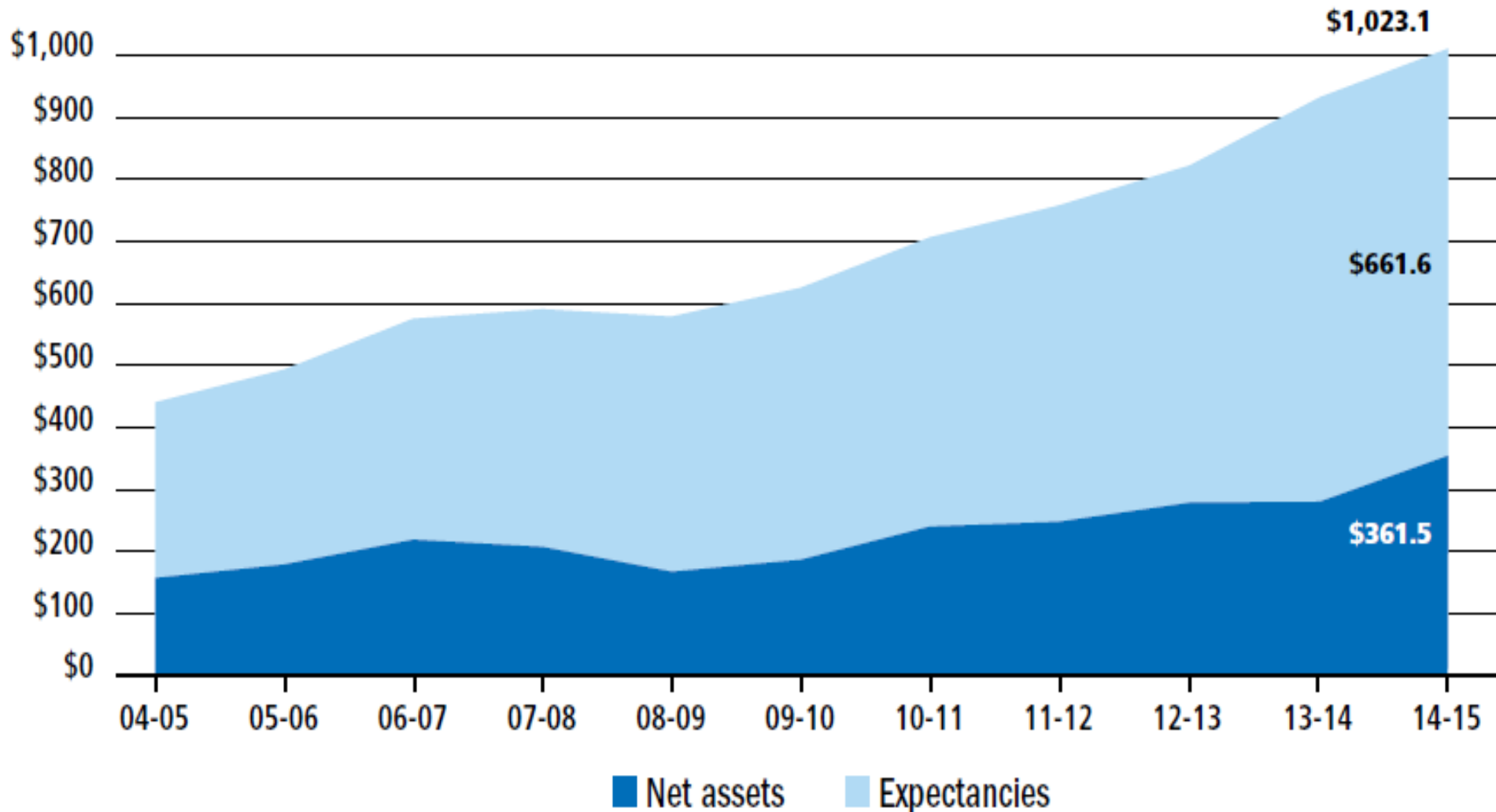
WHY THE ENDOWMENT FUND?

- Establish your Rotary legacy
- Provide ongoing support to Foundation grants and programs that are most important to you.



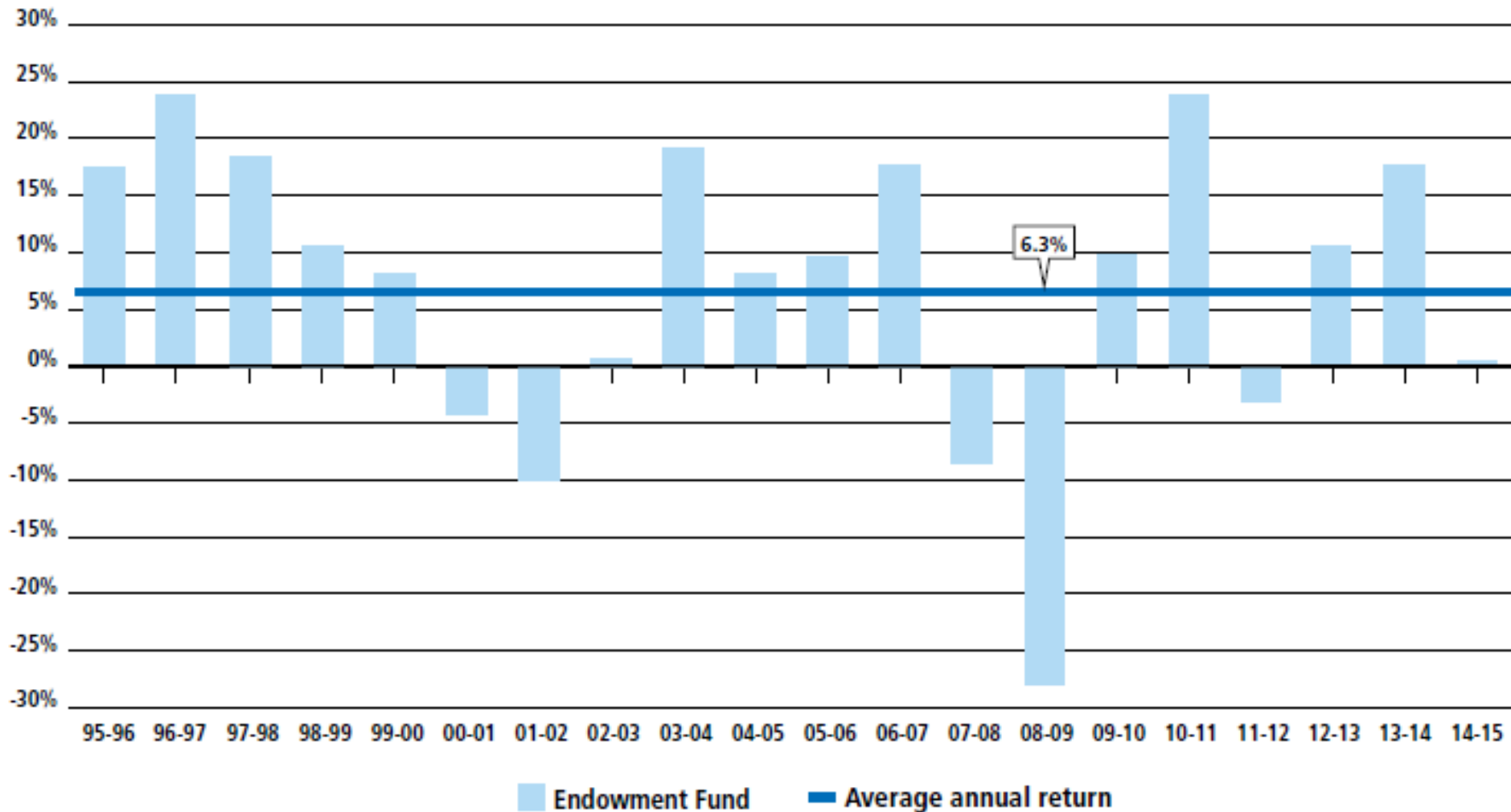
ENDOWMENT FUND 2004-2015

ENDOWMENT FUND MARKET VALUE AND EXPECTANCIES (US\$ MILLIONS)



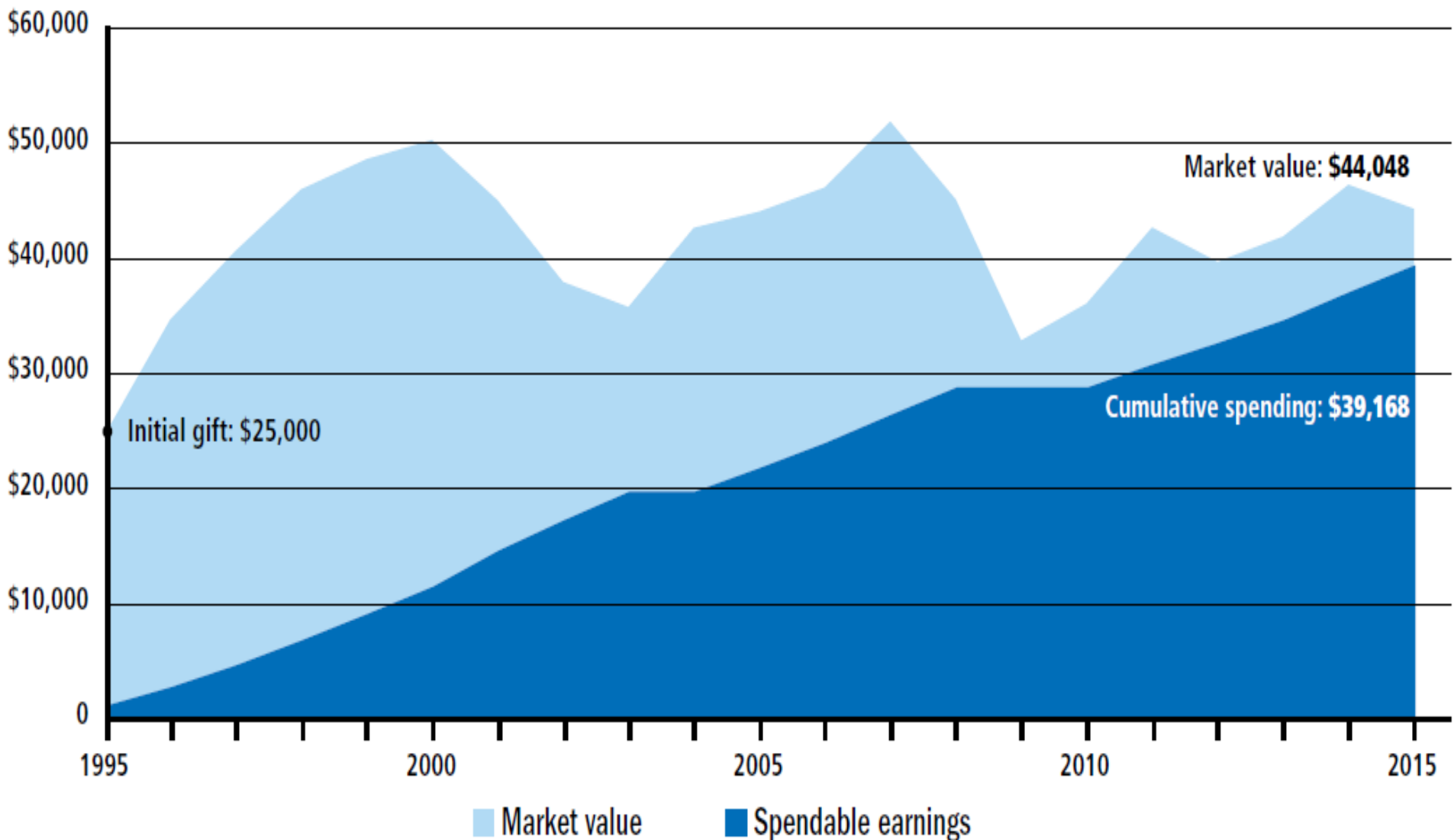
Return of Investments 1996-2015

RETURN ON INVESTMENTS



NAMED ENDOWMENT FUND GROWTH EXAMPLE

A 20-YEAR SNAPSHOT



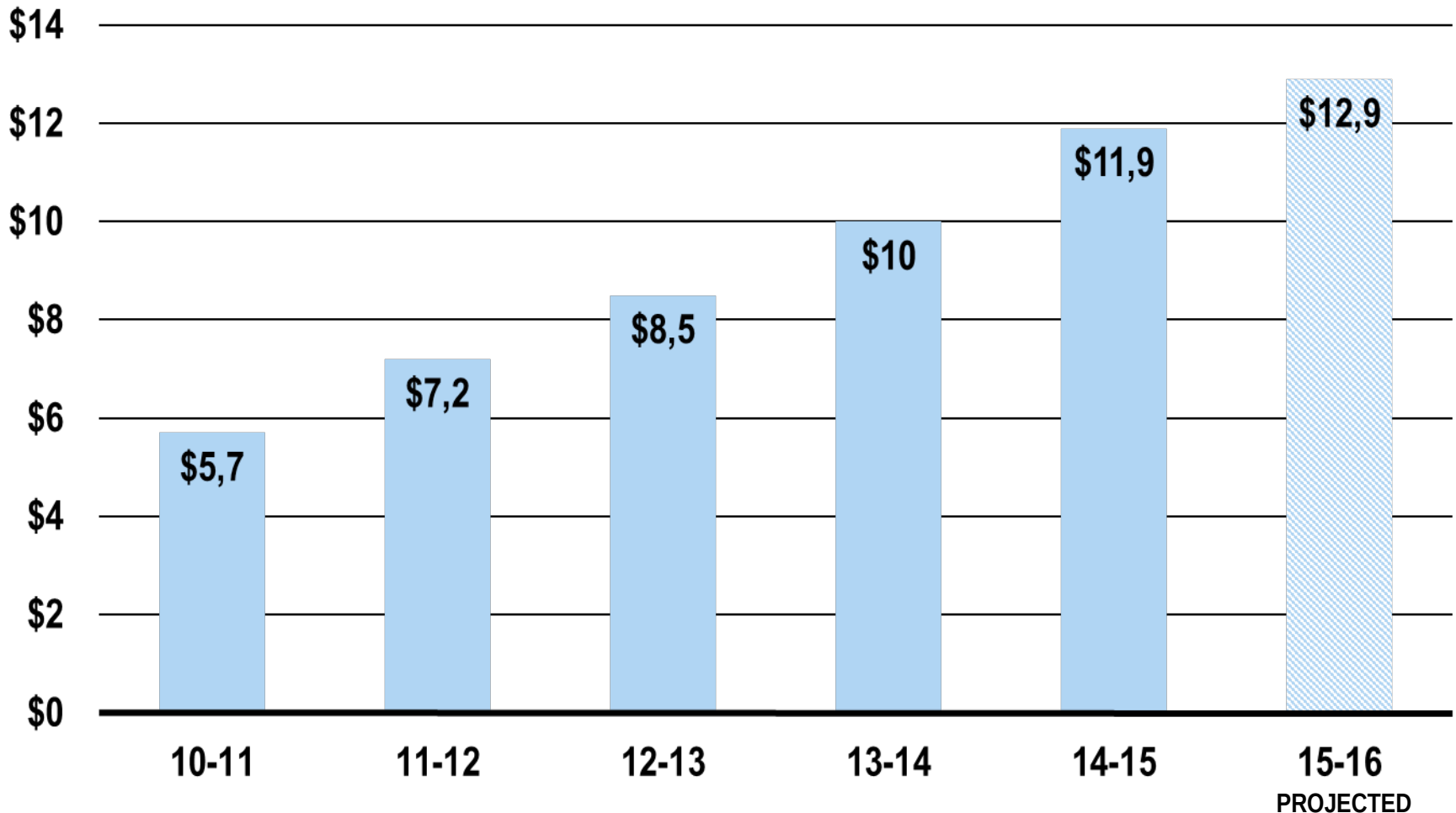
SPENDING POLICY, EFFECTIVE SINCE YEAR 2013-2014

SPENDING RATES AND TIERS

Tier	Status of named endowed fund at 31 December 2013	Spending	Spending Rate
1	Market value below accumulated gift value by more than 10%	No Spending	0.0%
2	Market value below accumulated gift value by 10% or less	Conservative Spending	2.0% ¹
3	Market value at or above accumulated gift value by 10%	Modest Spending	4.0% ²
4	Market value above accumulated gift value by more than 10%	Full Spending	5.0% ³

SPENDABLE EARNINGS

ENDOWMENT FUND EARNINGS AVAILABLE FOR SPENDING (US\$ MILLIONS)



ROTARY PEACE CENTERS

- Up to 100 Rotary Peace Fellows chosen each year to study at one of our 6 Rotary Peace Centers at 7 prestigious universities
- Program of study and applied field experience in areas relating to peace and conflict resolution



HOW YOU CAN HELP



- Educate Rotarians about Rotary's Endowment
- Know how to identify prospects.
- Lead by example.

ENLISTING THE HELP OF OTHERS

- District Leaders
 - the District Rotary Foundation Chair
- Zone-level Leaders
 - Regional Rotary Foundation Coordinators and their assistants
 - Endowment/Major Gifts Advisors
- Senior Rotary Leaders
 - Rotary Foundation Trustees
- Staff



RESOURCES

- Endowment Fund Financial Report
2014-15
- Major Gifts Major Impact brochure
- Your Rotary Legacy brochure
- Rotary Peace Centers brochure
- Ways to Give brochure