



ROTARIAN
FOUNDATION
OF
LIVERMORE

Reach into the Future

Board of Directors 2008 - 2009

Kenneth Coburn
Kathy Coyle
Lorraine Dietrich
Kevin Drake; President of Rotary Club of Livermore Valley
Dennis Gambs
Bill Geyer; President of Livermore Rotary Club
John Gordon, Treasurer
Thomas Heath
John Linn
Susan Mayall
David Mertes, President of Rotarian Foundation of Livermore
Javier Perez
Peter Poulsen
Wolfgang Stoeffl
Michael Thompson
Gretchen Rutherford, Secretary

Information on methods of using annuities and bequests to
benefit your local community through the
Rotarian Foundation of Livermore



ROTARIAN
FOUNDATION
OF
LIVERMORE

www.rotarianfoundationlivermore.org

Who we are:

The Rotarian Foundation of Livermore is operated and supported by the two Livermore Rotary clubs. Its purpose is to support the Livermore community and its members, with an emphasis on the youth of our community. The Foundation was begun in 1987 to provide a vehicle for members of the community to give back to the community. The Foundation is operated by volunteers and its administrative costs are minimal.

Our goals:

The goals of the Rotarian Foundation of Livermore are to enhance the educational, health, recreational, cultural, and career opportunities of young people, and to promote community service for the benefit of all in Livermore. These goals will be advanced through annual and multi-year open and challenge grants which support high-leverage project initiation, operation, and facilities. The Foundation will operate in an open and fair manner that promotes good will and over-all benefit to the Livermore community.

What we do:

The Foundation has been highly successful; in recent years it has contributed approximately \$70,000 / year to deserving community efforts. In 2007 the Foundation purchased a \$350,000 Mobile Health Unit to serve those in our community who are under-insured and who have medical needs. It is operated and staffed by the Valley Health Care Systems and can be seen at local schools and at communities for the elderly attending to those who need it the most. A description of other Rotarian Foundation projects and the Mobile Health Unit can be found on our website: www.rotarianfoundationlivermore.org

How you can contribute:

There are many options for donors who wish to use The Rotarian Foundation of Livermore as a vehicle for charitable giving to our community.

- Cash contributions or other property
- Bequests
- Structured gifts, such as a Charitable Remainder Trust or a Charitable Lead Trust
- Designation of the Foundation as a beneficiary in a 401k or IRA account
- The gift of a life insurance policy to the Foundation

The Rotarian Foundation of Livermore was incorporated as a 501(c)3 non-profit organization. It is classified by the IRS as a public charity, and donations are tax deductible. Depending on an individual's personal financial situation, there may be various tax benefits, including income tax deductions or estate and gift tax advantages, to be gained by making a gift to The Rotarian Foundation. This information is not meant to substitute for legal advice or direction, but merely to spark a conversation between potential benefactors of The Rotarian Foundation of Livermore and their personal Estate Planning Attorneys and Tax Advisors.

A brief description of possible ways to “reach in the future” by gifting through the Rotarian Foundation of Livermore is given on our website www.rotarianfoundationlivermore.org. The Foundation can be contacted by email through the website.

