



“This is the most tragic situation that you can imagine. The support from Rotary and the world has really stepped up to help and thank you for it.”

Past District 7020 Governor and Haiti District Coordinator Dick McCombe

The Haiti Earthquake Relief Fund, a donor advised fund within The Rotary Foundation of Rotary International, has been established to streamline the flow of contributions from Rotarians looking to assist victims of the earthquake in Haiti. The fund will be directed by the account holders listed below.

The account holders will work with local Rotary clubs and districts, as well as emergency relief agencies, to meet the most pressing needs of people in affected areas. Account holders will make grant recommendations after consulting with District 7020 Governor Errol Alberga or his designee. Funds will be used in the relief effort and for projects providing longer-term support and development (e.g. funding for Rotary Foundation Matching Grant projects).

Haiti Earthquake Relief Fund Account Holders

Eric E. Adamson, Vice President, RI (from Zones 33-34)

Barry Rassin, Past Rotary International Director (Zones 33-34)

John Smarge, Director Elect (from Zones 33-34)

Robert Stuart, Jr, Past Rotary International Director

Frequently Asked Questions

- **How can I contribute?** Please see the detailed instructions on page 2. You may contribute via check, credit card, wire transfer or stock transfer. All contributions must be in U.S. dollars and only U.S. tax receipts will be issued. On all contributions, please be sure to reference the **Haiti Earthquake Relief Fund, #296**.
- **What amount of my contribution will actually go to the relief effort in Haiti?** Nearly 100% of contributions to the Haiti Earthquake Relief Fund DAF will be granted to IRS-approved charitable organizations helping to provide relief and recovery. There is a small fee of 1.3% which covers the administrative and investment costs. Additionally, on 1 July of each year, 1% of the fair market value of the Haiti Earthquake Relief Fund DAF is contributed to the Annual Programs Fund of The Rotary Foundation to support the programs of the Foundation. Please note that the Haiti Earthquake Relief Fund DAF will make grants to other charitable organizations that may have other costs. However, efforts will be made to provide grants to organizations that directly support the needs of individuals and communities through the Rotary volunteer structure and other aid organizations. Additional fees may apply depending on the method of your contributions.
- **Will I receive recognition for my contribution?** Contributions to TRF DAF accounts are not eligible for Paul Harris or Major Donor recognition.
- **Where can I learn more about The Rotary Foundation Donor Advised Fund (TRF DAF) and how it works?** Please visit www.rotary.org/daf for more information on TRF DAF.

For assistance, please contact at Annie Palubicki (847) 866-3488 or annie.palubicki@rotary.org



You may contribute to the Haiti Earthquake Relief Fund by following the instructions below.

Check

Payable to: The Rotary Foundation
DAF
In the Memo line: Haiti Earthquake Relief
#296
Mail to: Rotary DAF
c/o NRS
4A Gill Street
Woburn, MA 01801

Credit Card

Complete the "Donor Advised Fund Credit Card Contribution Form" (please see next page)

Mail to: Rotary DAF
c/o NRS
4A Gill Street
Woburn, MA 01801
Or Fax to: 781-938-0134

Wire Instructions

In addition to authorizing the wire, you must fax a copy of the wire authorization to (781) 970-5088 to complete the transfer. Please contact Annie (below) for the authorization form.

Please wire funds to: Boston Private Bank & Trust Company
ABA Number: 011002343
For credit to: The Rotary Foundation
Account number: 4077482
For Further Credit: TRF DAF
Account Name: Haiti Earthquake Relief DAF

Stock Instructions

In addition to authorizing the trade, you must fax a copy of the trade instructions to (781) 970-5088 to complete the transfer

DTC Shares to: SEI Private Trust Company
DTC Participant ID: 2039
Agent Bank ID: 94952
Credit to: Rotary Clearing/Liquidation Account
Account Number: 755Z0007
Agent Internal STC Account Number: 11110-C

Please note:

- All contributions are irrevocable.
- All contributions greater than \$250.00, from individuals and corporations, will be issued a U.S. charitable tax receipt. The IRS will accept copies of cancelled checks for less than \$250 as a charitable receipt.
- See the Program Circular on how TRF recognition, if any, is awarded for DAF contributions and grants.
- For more information about how Donor Advised Funds operate, please visit www.rotary.org/daf
- Non-U.S. contributions may be subject to additional information to meet U.S. guidelines for international fund transfers.
- All contributions must be in U.S. dollars and cannot be by money order or cashier's check
- Only U.S. charitable tax receipts will be issued.



Haiti Earthquake Relief Credit Card Contribution Form

By making a contribution via credit card, the donor acknowledges that he or she has read and understands The Rotary Foundation Donor Advised Fund Program Circular, which can be found at www.rotary.org/daf.

Contribution Information for an Irrevocable Gift to The Rotary Foundation

Contribution amount: \$ _____

Written: _____

TRF DAF Account Name: Haiti Earthquake Relief Fund

DAF Account Number (if known): 296

Credit Card Information

Visa Mastercard Discover AmEx Diners Account # _____

Expiration Date: _____ Verification Code (3 digits found on signature panel): _____

Name (as it appears on card): _____

Signature: _____ Today's Date: _____

Billing Address: _____

City _____ State _____ Zip Code _____

Contact Information

Main Telephone: (____) _____ Alternate Telephone: (____) _____

Email Address: _____

Optional Rotary Information

The name of my Rotary Club is: _____

Club #: _____ District #: _____

Credit card contribution forms received after 3:00 p.m. (EST) will be processed the next business day. Do not use this form for general contributions to The Rotary Foundation. Once the contribution is processed, the donor credit card information will be destroyed.

Please send this completed form to:

Rotary DAF
c/o NRS
4A Gill Street
Woburn, MA 01801-1721

Fax: 781-938-0134, Attn: Donor Advisor Team

For assistance, please contact Annie Palubicki at (847) 866-3488 or annie.palubicki@rotary.org



Haiti Earthquake Relief Fund Contribution

Please print this form and mail it in with your contribution check

DAF Account Name: Haiti Earthquake Relief Fund Account No: 296

Please make checks payable to: **The Rotary Foundation Donor Advised Fund (or TRF DAF)**

Checks may be sent to: **Rotary DAF
c/o NRS
4A Gill Street
Woburn, MA 01801**

All contributions over \$250 will be provided an individual confirmation, which will be suitable as a receipt for income tax purposes. Please complete a Donor Information section for all donors over \$250. Please See the Program Circular (www.rotary.org/daf) on how TRF recognition, if any, is awarded for DAF contributions and grants. **Thank you for your support.**

Donor Information Please print. Other than your name, there is no need to fill out information that is printed on your check.

Mr. Mrs. Ms. Dr.

Name: _____

Telephone: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Rotary Club: _____

Contribution Information and Signature

Enclosed is a contribution in the amount of US \$ _____ for the Haiti Earthquake Relief DAF (#296). This check, made payable to **The Rotary Foundation Donor Advised Fund**, represents my gift to the Donor Advised Fund account listed above. I understand my contribution is irrevocable. I also understand that I do not have any grant or investment allocation recommendation privileges.

Signature _____ Date _____

Printed Name _____