



## Syd Hardt Legacy Society

### *Give a Gift for Tomorrow*

Syd Hardt left a special legacy to the Rotary Club of San Jose, not just in the financial wealth he left on his passing, but also in his great joy of service and fellowship. Syd's gift allows the Rotary Foundation to make significant gifts to the community year after year.

The Syd Hardt Legacy Society honors and recognizes members who have chosen to benefit the Rotary Club of San Jose Foundation ("the Foundation") through charitable gift planning.

Members of the Syd Hardt Legacy Society share a strong common bond of generosity that nourishes the Foundation's achievements and ensures that its programs continue for many generations to come.

#### **Ways of Giving:**

The Syd Hardt Legacy Society will honor Rotarians and friends of Rotary who have a planned giving provision in their estate plans or have stated to the Foundation they intend to do so.

A planned gift may be done in a number of ways; including naming the Foundation as a:

- Beneficiary in your will or living trust
- Recipient of a charitable trust
- Beneficiary of retirement plan assets
- Beneficiary and owner of a life insurance policy

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### **Donor Recognition:**

The Foundation recognizes the significant role that the planned giving donors play and is pleased to pay special tribute to their philanthropic leadership and vision.

Membership recognition for donors includes the following:

- Donor's name listed in the Syd Hardt Legacy Society honor roll of donors
- Special invitation to events organized for the Syd Hardt Legacy Society members
- Special invitation to other events
- Recognition as Endowment Patron, as appropriate, upon receipt of funds

### **Contacts:**

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Vince Sunzeri at [vincent.sunzeri@morganstanley.com](mailto:vincent.sunzeri@morganstanley.com) or (408) 358-0955

Barbara Bremner, Executive Director of the Rotary Club of San Jose, at [barbarab@sjrotary.com](mailto:barbarab@sjrotary.com) or call 408-297-6101



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### Frequently Asked Questions

- 1) Is the dollar value of a member's gift recognized?

*No. The Syd Hardt Legacy Society recognizes the method of giving, not the size of the gift.*

- 2) What if I want to remain anonymous?

*The Syd Hardt Legacy Society will gladly accept "legacy gifts" where the donor does not desire public recognition.*

- 3) Do I need to share my estate planning documents with the foundation?

*No, but it is important that your gift be properly directed to: "The Rotary Club of San Jose Foundation, Inc.". Gifts are usually designated to the Permanent Endowment. If you have any specific directions, you, your attorney, or other estate planning professional should communicate them to us. All of this is to ensure that the Foundation understands how you want your gift to be used.*

*We do ask for the type of gift, professionals involved, acknowledgment desired, and other information. for our records.*

- 4) What if I change my plans?

*The Syd Hardt Legacy Society recognizes your current intention to support the Rotary Club of San Jose Foundation. If your gift is revocable, the Foundation accepts that your gift plans may change in the future. If this is the case, please let us know.*

- 5) What if I have further questions?

*Contact:*

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