

Ann Arbor Rotary Foundation



- The Ann Arbor Rotary Foundation is completely separate from the Rotary International Foundation. The monies from the Rotary Foundation make a significant contribution to the local community and beyond.
- As of December 31, 2017, the Rotary Foundation's total permanent assets were as follows (see chart):
- The Fund has an Investment Policy that requires it to invest in publicly traded, broadly diversified mutual funds so as to obtain a total rate of return in excess of an established benchmark. This benchmark utilizes market indices that are weighted according to the Fund's target asset allocation, approximately 85% stocks and 15% bonds.
- The Foundation has a Spending Policy that requires it to distribute 4.25% of the assets each year, based on the average market value for the preceding 20 quarters.
- As a result of contributions to the Foundation, as well as good investment results, the distribution amount to the "community" is as follows (see chart):

