

# Three Easy Ways

*For simplicity's sake, detailed below are three easy ways to include Trinity Church as part of your legacy*

## 1. Bequest

The easiest way to make a lasting difference is to remember Trinity in your will. If you have an existing will, we encourage you to work with your lawyer to prepare a simple, inexpensive codicil. Keep in mind that you can bequeath a specific amount or percentage of your estate, providing unrestricted support through the Trinity Perpetual Memorial and Endowment Fund. Income from the fund will be used each year for the care of our historic buildings and grounds and for sustaining clergy excellence. The bequest can specify a gift of cash, securities, real estate or tangible personal property. For example:

I give (specific dollar amount or asset) to Trinity Episcopal Church (EIN 72-0467513) to be used for the unrestricted use of the parish.

## 2. Retirement Plan Assets

Often considered an attractive option for making a planned gift, retirement plan assets are among the most tax burdened assets in an estate. To make a charitable gift of retirement assets, you simply need to complete a new beneficiary designation form naming Trinity Church as a percentage beneficiary. Please remember to include the following information to ensure accuracy:

Trinity Church Episcopal  
1329 Jackson Avenue  
New Orleans, LA 70130  
(EIN 72-0467513)

## 3. Life Insurance Policies

You may use one or more whole life insurance policies to make a future gift to Trinity. To do so, name Trinity Church as a percentage beneficiary of a new or existing policy, or simply transfer ownership. As with retirement plan assets, using a life insurance policy to make a charitable gift can be as quick and easy as completing a new beneficiary designation form.

*This information is not intended to be tax or legal advice and should not be relied on as such. Please consult with your legal and tax counsel regarding implications of a specific charitable gift.*



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