

Become a Trinity Legacy Builder

Legacy Builders Preserve the Future of Trinity Cathedral

You may already be a Trinity Legacy Builder!

If you have included the Trinity Foundation in your will, beneficiary designations of insurance policies, IRAs, or other qualified retirement funds, or any other estate planning option, all you need to do is to complete and submit the *Estate Planning Gift Designation* form to inform the Foundation that you want to be listed as a **Trinity Legacy Builder**. The size of the gift is immaterial and does not have to be disclosed to the Foundation. Your bequest may be unrestricted or restricted to the General Endowment Fund or to any other Foundation Fund.

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The most frequently used planned giving options are to name Trinity Foundation as a beneficiary in your will or your IRA. The *Trinity Foundation Giving* brochure, available from the Foundation office, provides information about **Legacy Builders** and the Trinity Foundation. The Foundation website (trinitysc.org/foundation) provides information about a variety of planned giving options.

- *Trinity Foundation Funds Descriptions* describes the Foundation Funds to which you may direct your bequest.
- The *Estate Planning Gift Designation* form provides the choices available for describing and designating your gift to become a **Legacy Builder**.
- The *Gift Acceptance Policy* describes the type of gifts that Trinity and the Foundation can accept.

For more information about making a gift to the Foundation, please email foundation@trinitysc.org or call 803-771-7300. Also, please remember to check with your attorney, accountant, or tax advisor for additional or more specific information.

Once you complete the *Estate Planning Gift Designation* form, submit it to the Foundation, foundation@trinitysc.org, to be listed as a Trinity **Legacy Builder**.

How Can Couples Handle Contingent Gifts?

Both spouses may be listed as Trinity **Legacy Builders**. Often married couples use contingent gifts so that the gift occurs upon the death of the last surviving spouse. If you have included a contingent gift, it is helpful, but not required, to inform to the Foundation that the bequest is contingent. You may direct Trinity Foundation to record the bequest in the name of both spouses in the planned giving document, if you wish to do so.