

# How to Become A Trinity Legacy Builder?

*Legacy Builders Preserve the Future of Trinity Cathedral*

## You may already be a Trinity Legacy Builder!

If you currently have 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 notify 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.

## How to Become a Trinity Legacy Builder?

The most frequently used planned giving options are to name the Trinity Foundation as a beneficiary in your will or your IRA. The Foundation website has current documents posted to provide information about a variety of planned giving options.

- The Foundation Fund Description document provides the description of all of the Foundation Funds that you may wish to direct your bequest.
- The Gift Acceptance policy provides information on the type of gifts that Trinity and the Foundation can accept.
- The Trinity Foundation Giving brochure is being updated and will be posted as soon as it is completed.

Please contact the Foundation (Patti Trotter / 803.446.1985 / [ptrotter@trinitysc.org](mailto:ptrotter@trinitysc.org)) or the Commissioners for more information. Also, please remember to check with your attorney, accountant, or tax advisor for additional or more specific information.

Once you complete your planned giving document, all you need to do is to notify the Foundation that you have included the Trinity Foundation in your planned giving and wish 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 indicate 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.