

Making a Gift of Stock to Trinity?

When making a gift of stock to Trinity, we ask that you or your agent notify Paul Flyger, Trinity's Finance Manager, in advance or at the time of the transfer. We will then be able to watch for your gift, as well as note the gift appropriately on your statement.

Paul can be reached at 503-478-1226 or by email at paul@trinity-episcopal.org

To wire stock transactions:

- Contra Party Bank: Charles Schwab & Co., Inc.
- Contra Party DTC Account Number: 0164, Code 40
- Contra Party Customer Account Number thru DTC: 27728442
(Stock Gift Acct.#)
- Customer Name on the Account: Trinity Episcopal Cathedral

Trinity's Federal Tax ID: 93-0386940

Using Your IRA to Make Your Gifts to Trinity?

If you are age 70½ or older, you qualify to make a charitable gift from your traditional IRA account. The IRA Charitable Rollover provides you an excellent opportunity to make a gift during your lifetime from an asset that would be subject to multiple levels of taxation if it remained in your taxable estate.

For any questions, please contact Paul at 503-478-1226 or by email at paul@trinity-episcopal.org