

YOUR LEGACY AT TRINITY

This worksheet is designed to help you support Trinity Episcopal Cathedral through a planned gift.

Please indicate how you would like your gift divided and email this form to Shannon Tilton, Cathedral Life Administrator: shannon@trinity-episcopal.org.

We also recommend keeping a copy of this worksheet with your will, trust, or other planned giving instrument so you can update it as your vision for your legacy at Trinity evolves.

GETTING STARTED

NAME: _____ PHONE: _____

EMAIL: _____

How would you like to direct your planned gift to Trinity?

_____ % **CATHEDRAL GENERAL ENDOWMENT** *(20% minimum recommended)*

We recommend that at least 20% of your gift be allocated to the Cathedral's general endowment.

This provides Trinity with the necessary flexibility to meet its evolving needs into the future.

Our ministries include:

_____ % **UNCOMMON WARMTH** *(Community Life and Pastoral Care)*

- Worship and spiritual development
- Pastoral care

_____ % **HOLY COMPASSION** *(Outreach and Service)*

- Community and neighborhood outreach
- Service to vulnerable populations, whose needs are great, including the Trinity Food Pantry and Wednesday Community Lunch

_____ % **INTELLECTUAL CURIOSITY** *(Education and Spiritual Formation)*

- Education for children and youth
- Forums, classes, and contemplative programs for adults

_____ % **DEEP BEAUTY** *(Music and Art)*

- Cathedral Choir and the Trinity Choir School
- Concert series & special services (Evensong, Lessons & Carols, etc.)
- Visual arts (art exhibits, classes, etc.)

_____ % **HOLMAN CONSERVATION TRUST**

The Holman Trust was established to provide funding for maintenance, repairs, and improvements to the Cathedral sanctuary, campus buildings, and grounds. The trust supports deferred maintenance and renovations to the facilities, as well as the preservation of religious and historic building elements.

_____ % **ADMINISTRATIVE DISCRETIONARY FOR OPERATIONS**

Recruiting and retaining top-level staff requires more than just salaries. This fund allows the Dean to support professional development—such as conferences, continuing education, and recognition bonuses—as well as provide additional short-term staffing for special projects. It offers a flexible resource for enhancing staff effectiveness at Trinity Episcopal Cathedral.

Questions or concerns? Contact Shannon Tilton, shannon@trinity-episcopal.org or 503.478.1223. Please feel free to share your own ideas about what you are hoping to achieve with a gift to Trinity. We are happy to work with you within our gift acceptance guidelines. Trinity Episcopal Cathedral's tax identification number is # 93-0386940.

