

The Trinity Church Steadman Society

Leaving a Legacy to Trinity Church

How to Make a Gift to Trinity

The Steadman Society is Trinity's way of honoring and thanking parishioners and friends who have arranged a bequest or planned gift to the Church. You will be automatically enrolled as a member of The Steadman Society when you notify Trinity that it is named as a beneficiary of a gift through your estate or through a planned gift during your lifetime.

The Society was named in memory of Maria and Charles Steadman, whose devotion and commitment to Trinity were invaluable during the early years of the Church. Mr. Steadman was the first warden of Trinity and the architect of the original church building.

Founded in 1998, The Steadman Society of Trinity Church currently has over forty living members (as of November 2009) including those who desire to remain anonymous. Members are invited to receptions and programs specifically for members of the Society and others who have an interest in becoming a member of The Steadman Society.

If you have already designated Trinity as a beneficiary of your estate or plan to do it in the near future, please let us know so that we can welcome you as a member of The Steadman Society. Just complete the "Welcome to The Steadman Society" form available at the Church office or on our website and mail or deliver it to Elly Matsil at the Church office.

Gifts made as part of an estate plan are an excellent way to leave a legacy to support the ministries of future generations of parishioners at Trinity.

Becoming a member of The Steadman Society is as simple as adding Trinity to your will or estate plan. For individuals with limited means to make a sizable contribution during their lifetimes, a bequest enables a gift after their estates have been settled.

For individuals with substantial assets, it is a way to significantly reduce their estate tax liability while simultaneously sharing their legacy with the Church. Regardless of its size, your gift will remain a legacy for succeeding generations of parishioners who follow you at Trinity Church.

For more information, please visit our website at www.TrinityPrinceton.org and click on the *Planned Giving* tab. Basic information about our Planned Gifts program is provided, including the Gift Acceptance Policy.

For any other questions, email Dan Haughton at dhaughton@connotate.com, or contact Elly Matsil the Church office by calling (609) 924-2277.

Trinity Church does not offer financial or legal advice. Please consult with your attorney or tax advisor before making a gift or bequest to Trinity.

- **Make a gift through wills or living trust.** Few legal instruments are more important to the people and causes that you care about than your will. Before you meet with your attorney, we suggest that you consider the ways you can make a bequest:

A **specific** bequest directs a dollar amount or particular asset, such as marketable securities, real estate or tangible personal property, to Trinity.

A **residuary** bequest directs all or a set percentage of the remainder of your estate to Trinity.

A **Charitable Trust** combines a gift to individuals and to Trinity.

- **Name Trinity Church as beneficiary.** Trinity welcomes gifts that are a remainder interest in an IRA or other qualified retirement plan (i.e. Keogh, tax-sheltered annuity, or qualified pension or profit-sharing plan).

For some people, these can be the most highly taxed assets they own, since retirement plan assets can be subject to both estate and income taxes.

When you decide to make a gift to Trinity, you will need to provide Trinity's tax identification number: 210-64-7707.

A Giving Legacy

Thoughtful financial and estate planning can benefit you, your loved ones and Trinity Church—all at the same time.

The Steadman Society is Trinity's way of recognizing and thanking you for remembering Trinity Church in your will or estate plan.

Making a gift to Trinity is easy. Please prayerfully consider your legacy bequest to help Trinity Church in its future ministries, then discuss it with an attorney or financial advisor.

Frequently Asked Questions

Who can make a bequest to Trinity?

Anyone can make a bequest and there is no minimum amount. All gifts to Trinity will be gratefully received and acknowledged.

What types of gifts can Trinity accept?

Gifts can be made in the form of cash, marketable securities, a life insurance policy or an IRA distribution. Trinity also welcomes gifts of real estate and personal property subject to review by the Finance Committee of the Church. Trinity has a Gift Acceptance Policy, which is available for viewing at www.trinityprinceton.org.

Are there different ways to write a bequest?

Yes. The following are a few examples:

"I give and bequeath to Trinity Church, Princeton, NJ, _____% of my residual estate."

"I give, devise and bequeath to Trinity Church, Princeton, NJ, the sum of _____ dollars, _____ shares of stock in XYZ Corp, or my real property located at _____."

"In the event that my spouse and children are not living at the time of my death, I give all the rest, residue and remainder and my estate to Trinity Church, Princeton, NJ."

Are bequests tax deductible?

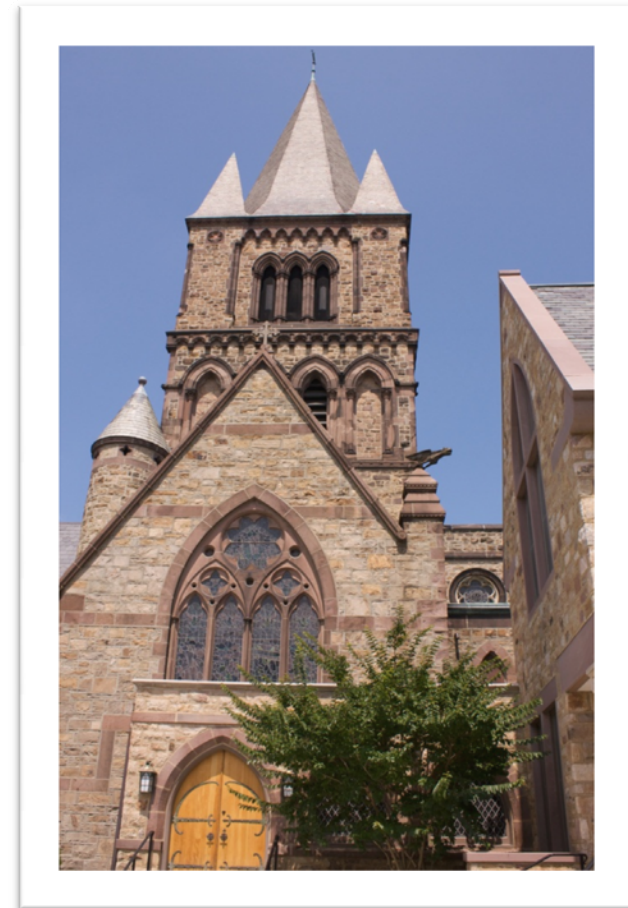
Yes. Contributions may reduce or eliminate capital gains costs and estate tax liabilities

Does Trinity offer life income gift vehicles such as Charitable Remainder Trusts and Charitable Gift Annuities?

There are plans to expand Trinity's Planned Gift Program to include life income gifts. Meanwhile your attorney or financial advisor can assist you in establishing a charitable trust that pays you or your loved ones and also benefits Trinity.

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