

If you are considering a planned gift, please consult with loved ones, professional advisors, and attorneys. You may designate your gift either to the general operating fund of the church, to the endowment, or to a specific area of ministry that is most meaningful to you.

8 N. Laurel Street
Richmond, VA 23220
phone 804.359.5628
fax 804.353.2348
www.ghtc.org

Planned gifts can be made during your lifetime or occur after your death. Forms of planned gifts include:

- Naming the church as a beneficiary of your retirement account or insurance policy
- Charitable gift annuities or charitable remainder trusts
- Making a gift via a donor advised fund or a charitable IRA disbursement
- Giving appreciated securities, such as stocks, bonds, or mutual funds
- Making a bequest in your estate plan

Grace and Holy Trinity Episcopal Church wants to honor donors' philanthropic wishes and will document those details in a confidential memo, which is kept on file at the church.

In order to make a bequest, you should contact your attorney. Direct bequests can vary; typically, they are a percentage of your overall estate or a specific dollar amount of an asset. Alternatively, you can make a residual bequest (the balance of an estate after the will or trust has given away specific bequests).

If you are considering a restricted gift to apply funds for a specific purpose, please contact Barb Dodd, Associate for Generosity, Discipleship and Communications, at 804.359.5628 ext. 16. We would be happy to work with you and your attorney to craft language to accomplish your goals.

If you have included Grace and Holy Trinity Church in your estate plans, please let us know. We would like to thank you and recognize you for your gift through our Legacy Society.

Identification

Formal Name: Grace and Holy Trinity Episcopal Church *or*
Grace and Holy Trinity Endowment Fund, Inc.

EIN: 54-0524502

Address: 8 North Laurel Street, Richmond, VA 23220

Contact: Barb Dodd, Associate for Generosity, Discipleship and Communications

Email: bdodd@ghtc.org | **Phone:** 804.359.5628 ext. 16

Transfer of Securities

Please provide the following information to your broker to initiate a transfer. When making a gift from your investments, please inform either Barb Dodd or Judy Bowman at the church so that we will expect your transfer in a timely manner.

Church Brokerage Firm: Davenport & Company LLC

***DTC Number:** 0443 (Pershing) | **Account Number:** DA4002535

Address: 901 East Cary St. #1100 | Richmond, VA 23219

Representative: Marie Barté

Email: mbarte@investdavenport.com | **Phone:** 804.780.2056

**The DTC and account number changed May 10, 2021 per Davenport & Company LLC.*