



# Grace & Holy Trinity Church

*an Episcopal parish on Monroe Park*

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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.

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 & Holy Trinity 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 Kathy Schultheis, Financial Administrator, at (804) 359-5628 x14. We would be happy to work with you and your attorney to craft language to accomplish your goals.

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

## ***Identification***

**Formal Name:** Grace & Holy Trinity Church

**EIN:** 33-2496516

**Address:** 8 North Laurel Street, Richmond, VA 23220

**Contact:** Kathy Schultheis, Financial Administrator

**Email:** [kschultheis@ghtc.org](mailto:kschultheis@ghtc.org)

**Phone:** (804) 359-5628 x14

## ***Transfer of Securities***

Please provide the following information to your broker to initiate a transfer. When making a gift from your investments, please inform Judy Bowman, Financial Secretary, so that we will expect your transfer in a timely manner.

8 N. Laurel Street  
Richmond, VA 23220  
(804) 359-5628  
[ghtc.org](http://ghtc.org)

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**Church Brokerage Firm:** Davenport & Company LLC

**\*DTC Number:** 0443 (Pershing)

**Account Number:** DA4002535

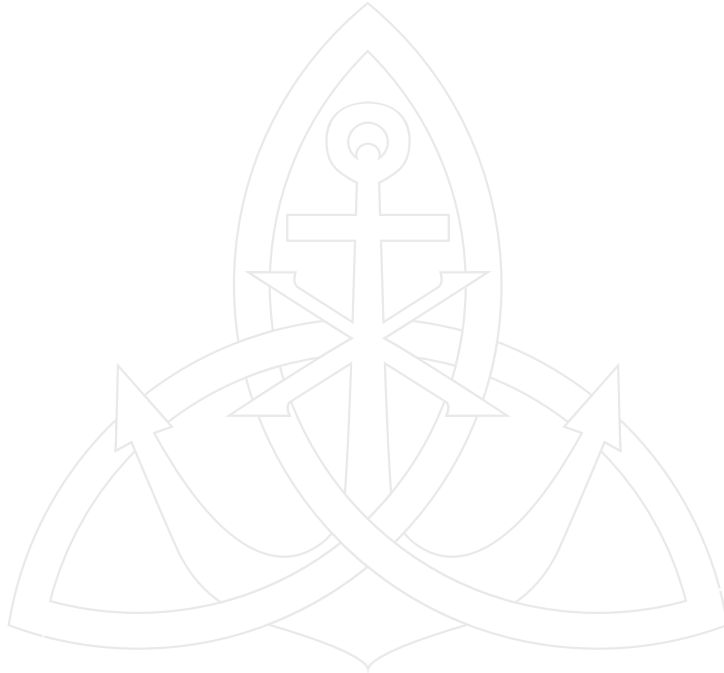
**Address:** 901 East Cary Street #1100, Richmond, VA 23219

**Representative:** Marie Barté

**Email:** mbarte@investdavenport.com

**Phone:** (804) 780-2056

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



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