



Grace & Holy Trinity Church

an Episcopal parish on Monroe Park

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 or
Grace and Holy Trinity Endowment Fund, Inc.

EIN: 54-0524502

Address: 8 North Laurel Street, Richmond, VA 23220

Contact: Jane Coffey, Financial Administrator

Email: jcoffey@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.

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.*

