

OTHER TYPES OF GIFTS

Gifts Through Charitable Trusts

Creating a charitable trust not only provides a donor an opportunity to make a truly significant gift to Trinity but also may provide the donor with a number of financial benefits:

- Providing a life income for the donor and others
- Reducing capital gains taxes
- Qualifying one for a charitable income tax deduction
- Reducing or eliminating probate expenses and estate taxes

Tax-Deferred Retirement Plans

Tax-deferred retirement plans such as 401(k) plans and individual retirement accounts (IRAs) allow a range of options for making gifts. Left as part of an estate, tax-deferred assets may be subject to income taxes, estate taxes, and in some instances, generation-skipping taxes. Properly executed, a plan that names Trinity as beneficiary can allow the entire amount of the bequest to pass directly to Trinity, free of all taxes.

Designating Your Gift

All gifts to Trinity Episcopal Church are deeply appreciated. Unrestricted gifts provide the parish with the flexibility to meet whichever needs are most urgent at the time of

the gift. If, however, you prefer to designate your estate or planned gift to benefit a particular program or to honor a loved one, please contact us so we might assist you with the wording of your designation to ensure that your intentions are honored.

Trinity's Capital and Endowment Campaign

As part of the \$3 million Looking Beyond Ourselves campaign, \$1.2 million is needed to establish an endowment to support ongoing maintenance and repair of church facilities. All undesignated estate and planned gifts will be first applied toward this endowment.

Trinity cannot render any type of legal or tax advice. Please consult your attorney or financial adviser before making a decision. All inquiries will be kept in strictest confidence.

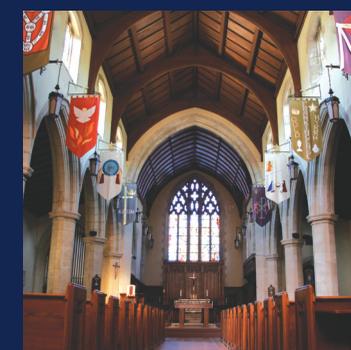
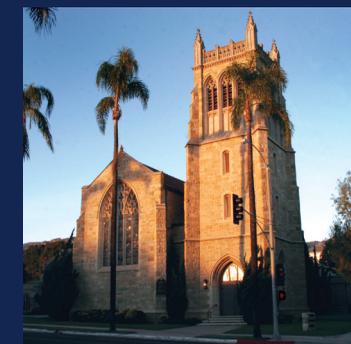


Open Hearts, Open Minds, Open Doors.

TRINITY EPISCOPAL CHURCH
1500 STATE STREET
SANTA BARBARA CA 93101

FOR MORE INFORMATION,
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Planned Giving Trinity Episcopal Church of Santa Barbara



LOOKING BEYOND OURSELVES



Throughout our lifetime at Trinity, each of us has offered gifts – of time, talent, and treasure – to build and sustain the mission and ministry of this parish. Now we have the opportunity to continue this stewardship in perpetuity through planned giving and membership in The Trinity Legacy Circle.

The Trinity Legacy Circle has been established to honor those who have looked beyond this life to make a commitment to Trinity's future. You can become a member by including Trinity in your estate plans. The greatest reward comes from knowing that you are supporting the mission and ministry of Trinity, now and into the future with a lasting gift.

We invite you to join with others whose generosity is the cornerstone of Trinity's Endowment Fund. The Endowment Fund receives, invests, and administers bequests and other charitable planned gifts to the parish. Income from the Endowment Fund is used to enable the parish to more completely fulfill its mission beyond what is possible through our annual stewardship drive.

Your planned gift will make a far greater impact than you ever imagined. It may also provide you with significant tax advantages and can continue to provide income to you and your heirs. To become a member of The Trinity Legacy Circle, or for more information, please contact the Rev. Mark E. Asman at 805.965.7419.



"To keep a lamp burning, we have to put oil in it." Mother Teresa

MAKING A BEQUEST TO TRINITY CHURCH

If you'd like to include Trinity in your will or living trust, you have two options:

- Make a gift of a specific amount of money.
- Leave a percentage of your estate to Trinity.

Example bequest language:

1. Bequest of cash

"I bequeath the sum of \$_____ to Trinity Episcopal Church of Santa Barbara, CA."

2. Bequest of a percentage of the estate

"I devise and bequeath XX% of the remainder and residue of property owned at my death, whether real or personal, and wherever located to Trinity Episcopal Church of Santa Barbara, CA."



"A gift opens the way for the giver and ushers them into the presence of the great." Proverbs 18:16

3. Contingent bequest

"If my brother John Doe survives me, I devise and bequeath XX% of the remainder and residue of property owned at my death, whether real or personal, and wherever located to John Doe. If John Doe does not survive me,

then I devise and bequeath XX% of my residuary estate, whether real or personal property, and wherever located to Trinity Episcopal Church of Santa Barbara, CA."

Although most gifts are in the form of cash or marketable securities, bequests of tangible assets such as residential real estate are also welcome, subject to the gift acceptance policies of Trinity Church.

CHARITABLE GIFT ANNUITIES

Through the Episcopal Diocese of Los Angeles, Trinity now offers a charitable gift annuity program for annuitants age 55 or older. Thanks to this popular and flexible program, you can enhance your income and make a gift with favorable tax benefits.

While securing a lifetime income that won't shrink (regardless of market conditions), you can also provide a legacy gift to Trinity. Through gift annuities, you receive these and other benefits:

- Fixed income for life
- Partially tax-free income
- Current charitable income tax deduction

Annuities may be written on the lives of one or two annuitants, and payment can be deferred or start within the year of purchase.

A minimum gift of \$5,000 is required to establish a gift annuity.