

**(Gifts of Securities continued)**

With careful planning, you can reduce or even eliminate federal capital gains tax while supporting the Trinity Foundation.

- You give securities to the Trinity Foundation.
- You receive an income tax deduction.
- The securities are sold and the Trinity Foundation receives the cash proceeds.

As stock prices increase, so do the taxes you owe on the long-term capital gain, which are generally charged at a rate dependent upon your tax bracket. But when you donate publicly traded stock you've owned for more than one year to a qualified charitable organization such as the Trinity Foundation, you enjoy two major tax benefits:

- You will be exempt from paying capital gains taxes on any increase in value—taxes you would pay if you had otherwise sold the securities.
- You are entitled to a federal income tax deduction based on the current fair market value of the securities, regardless of their original cost.

The income tax deduction for long-term capital gain property is limited to a percentage of your adjusted gross income in the year you make the gift, but your excess deduction is deductible for up to five additional years. It is important that you consult your financial or legal advisor who can provide you with additional information on the benefits of donating stock.

## **Trinity Episcopal Church Foundation of Fort Worth, Inc.**

P.O. Box 100085  
Fort Worth, Texas 76185  
Employer ID # 27-4026174

The Trinity Episcopal Church Foundation of Fort Worth, Inc. ("Trinity Foundation") is a 501 (c)(3) non-profit foundation established for the singular purpose of providing long-term financial support of Trinity Episcopal Church.

Tax-deductible contributions to the Trinity Foundation are invested, managed and administered with careful stewardship. Only the earnings from these legacy gifts are distributed to the church. Your gifts to the Foundation will have an everlasting and perpetual impact on the mission and ministry of Trinity Episcopal Church.

This information is provided to describe several simple ways you can support the Trinity Foundation to make certain you're your gifts not only benefit others today but countless generations to come.

For Additional information on  
Trinity Foundation, contact:  
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817/360-4153  
[www.trinityfoundationfw.org](http://www.trinityfoundationfw.org)



*Leave your legacy of compassion,  
devotion and service to  
Trinity Episcopal Church*

**The Mission of Trinity Foundation  
is to encourage and grow  
enduring gifts that enable  
Trinity Episcopal Church  
Fort Worth  
to do great works for the world.**

[www.trinityfoundationfw.org](http://www.trinityfoundationfw.org)

## The Gift That Is Best for You

One frequently asked question is, “What can I give?” This depends on your individual circumstance, which is why you should always consult your attorney or financial advisor. Your choices vary from simply writing a check to including Trinity Foundation in your will—with plenty of tax-smart options in between. A few simple ways of giving to the Trinity Foundation include:

### Gifts of Cash

The easiest, most common way for you to support the Trinity Foundation is with cash gifts—typically gifts by check.

#### How It Works

When you make a cash gift to the Trinity Foundation today, we both benefit. Your generosity enables us to meet our most urgent needs and carry out our mission on a daily basis. Your benefits include:

- The ability to choose how your gift is used.
- The opportunity to see the results of your generosity.

In most cases, an immediate charitable deduction is available on your federal income taxes, when you itemize.

### Gifts of Securities

Stock that has increased in value is one of the most popular assets used for charitable giving, once it has been held for more than one year. Making a gift of securities to us offers you the chance to help the Trinity Foundation while realizing many important benefits for yourself.

#### How It Works

A stock portfolio is often among the most valuable assets you own—and one that can carry substantial capital gains, or appreciation in value.

## Estate Gifts

Including Trinity Episcopal Church Foundation in your will or living trust, called a charitable bequest, offers these main benefits:

**Simplicity.** Just a few sentences in your will or trust are all that is needed.

### Suggested Language for a Bequest in a Will or Trust

I give to **Trinity Episcopal Church Foundation of Fort Worth**, a Texas nonprofit corporation in Fort Worth, Texas

*(Choose one of the following:)*

1. the sum of \$ \_\_\_\_\_
2. all of my interest in the following described property: \_\_\_\_\_
3. \_\_\_\_ percent or all of the residue of my estate,

*(Choose one of the following)*

4. to be used as the board of directors of the Trinity Foundation shall determine.
5. to be used for the benefit of (name a particular ministry or program).
6. to be used for the purpose of (for example: capital improvements, children's Christian formation, outreach, other purpose).
7. to be used in accordance with the terms of a signed **Gift Agreement Form**, as then in existence at the time of my death.

**Flexibility.** Because you are not actually making a gift until after your lifetime, you can change your mind at any time

**Versatility.** You can leave a specific item or amount of money, make the gift contingent on certain events, or leave a percentage of your estate to the Trinity Foundation.

**Tax Relief.** If your estate is subject to estate tax, your gift is entitled to an estate tax charitable deduction for the gift's full value.

## Gifts of Real Estate

Your property opens the door to a unique giving opportunity. From townhomes to farmland, many types of real estate can be donated to qualified charitable organizations like ours. You will be helping Trinity and enjoying tax benefits.

Imagine avoiding the hassle of selling a piece of property, with no worry about getting a fair price and at the same time realizing valuable income and estate tax deductions. This can be your reality when you consider using real estate to make a charitable gift to the Trinity Foundation.

#### How It Works

In addition to freeing you from the costs and responsibilities of ownership, making an outright gift of property that you've owned for more than a year offers these benefits:

- You obtain an income tax charitable deduction equal to the property's full fair market value. This deduction reduces the cost of making your gift and frees cash that otherwise would have been used to pay taxes.
- You eliminate capital gains tax on the property's appreciation. The transfer isn't subject to the gift tax, and the gift reduces your future taxable estate.

## Other Types of Gifts

Many other assets can be given to the Trinity Foundation as charitable contributions. Life insurance, trusts, and closely held stock are other examples. A Charitable IRA rollover and savings bonds are other assets you may consider for charitable contributions. Before making this important decision, please consult with your attorney or financial advisor and then contact the Trinity Foundation to make a legacy gift.