

Questions?

For questions or further discussion, please contact any of us.

Dale Anderson

Former Senior Warden, Treasurer and Stewardship Chair

Phone 612-810-7175

E-mail Dale.Anderson@drahotshots.com

Mark Capaldini

Former Stewardship Chair

Phone: (952) 567-9217

Email: mark.capaldini@gmail.com

Matthew Frerichs

Parish Member

Attorney at Law, Specialist in Trust and Estates Law

Robins Kaplan L.L.P.

Phone: (612) 349-8747

Email: mfrerichs@robinskaplan.com

Trinity Episcopal Church of Excelsior

322 Second Street

Excelsior, MN 55331

952-474-5263

trinityexcelsior.org



Trinity

Planned Giving

*We are the stewards who have inherited Trinity
from the generations before us.*

Bequest Fact Sheet for Trinity Episcopal Church

A “bequest” is a planned gift from your estate made via a will or revocable trust (“living trust”), which are legal documents. It is variant of the word “bequeath” and is a type of planned gift to the parish.

A bequest can be included with some very simple language when your will or revocable trust is written. If you already have a will, a “codicil” (a form of amendment) can be executed to add a bequest without changing any other terms of your existing will. Similarly, if you already have a revocable trust, a trust amendment can be executed to add a bequest.

Please note that there are multiple options for structuring a bequest, such as a flat dollar amount or a percentage of your estate. In addition, there are planning considerations for you, your spouse, and your heirs. The information in this document is provided for background and illustration only.

Note that under Minnesota law you must adhere to certain formalities in order to execute a legally valid will, codicil, revocable trust, or trust amendment. ***We encourage you to consult an attorney to develop and prepare your bequest in the proper legal form.***

A parish member who is an attorney specializing in Trust and Estate Law has offered to answer simple questions on a complimentary basis. His contact information appears on the back of this brochure. We appreciate your interest and will assist you in this planned gift process.

* * * * *

EXAMPLE TEXT

I make a bequest of \$XXXXXX (or Y% of my estate) to Trinity Episcopal Church, presently located at 322 2nd Street, Excelsior, Minnesota 55331.

[You may make a restricted bequest by adding language indicating how you wish the funds to be used. Or you may make an unrestricted bequest which gives the Vestry discretion regarding the use of the funds. This latter option is preferred because the needs of the parish can change over time and may be difficult to anticipate.]

* * * * *

If you have made a bequest or any other type of planned gift to Trinity Church, we would appreciate it if you would please inform our Treasurer that you have done so. We do not need any of the details of the bequest, but wish to maintain a list of all individuals who have made bequests or planned gifts to the church. We wish to do this as a good stewardship practice. In addition, we hope to recognize all individual bequests or planned gifts in some fashion, with details to be determined.