

Trinity Cathedral, Cleveland
Planned Gift Intention Form - Confidential

Dear Donor,

We realize that many people who plan to support Trinity Cathedral through their estate and/or financial plans prefer to keep their intentions private. However, by letting us know of your plans, we can thank you during your life and confirm that we are able to fulfill your stated intentions. Please know that completing this form is non-binding — we understand that you may change your plans at any time. All information you share with us is kept strictly confidential and in a secure location.

Gift Intent

It is my/our desire to inform Trinity Cathedral, Cleveland that a provision in my/our estate and/or financial plans has been made for the future benefit of Trinity Cathedral. This is not considered to be a legal pledge nor obligation and all information will be treated confidentially.

Name: _____ Date of Birth: ____/____/____

Spouse (if applicable): _____ Date of Birth: ____/____/____

Street Address: _____

City, State and Zip: _____

Type of Gift

I/We have provided a gift to the Trinity Cathedral as a bequest in:

☐ Will/Living Trust ☐ Life Insurance ☐ Retirement Plan ☐ Financial Account ☐ Charitable Trust

Name of Company/Financial Institution/IRA Custodian:

Gift Options

☐ Percentage of Will/Estate ☐ Specific dollar amount ☐ Specific asset(s) or property

If realized today, I/we estimate the value of this gift to be \$_____

Gift Purpose

☐ Unrestricted

☐ Designated for the following purpose(s):

Donor Listing

Trinity Cathedral honors individuals who make a planned gift through our Legacy Circle. This program exemplifies the importance of such gifts and expresses appreciation to those who provide for the future of the Trinity Cathedral .

☐ I/We would be pleased to be listed as member(s) of the Trinity Cathedral Legacy Circle in publications to serve as encouragement for others to give. My/Our name should be listed as follows:

☐ I/We would prefer to be listed anonymously.

Signature: _____ Date: _____

Signature: _____ Date: _____

Thank you for your generous and vital support of Trinity Cathedral.

Return this confidential response to:

Attn: Development Office, Trinity Cathedral, 2230 Euclid Avenue, Cleveland, OH. 44115.

As with any decision involving your assets, please seek the advice of a professional when considering a gift. Your signature verifies that the information provided above is accurate as of this date and does not represent a legal or binding commitment to the Trinity Cathedral. Trinity Cathedral is a qualifying 501(c) (3) nonprofit organization. Contributions are deductible as allowed by law.

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