

THE ENDOWMENT FUND

HOLY TRINITY GREEK ORTHODOX CATHEDRAL
OF PORTLAND, OREGON

The Endowment Fund raises and maintains financial resources for The Holy Trinity Greek Orthodox Community of Oregon, Inc. ("The Church"), and disburses them to groups within the Church and to other charitable organizations. These financial resources are used exclusively to promote and achieve the Church's religious, educational and philanthropic objectives, for purposes approved by the Church's Parish Assembly.

Recognizing that many worthwhile activities of the Church could not be supported through the annual operating budget, the Parish Assembly voted in 1993 to create an endowment for this purpose, with an initial allocation of proceeds from the Parish's Greek Festival. The Endowment Fund was formalized and included as part of the Parish Bylaws in 1998. The Fund's principal is invested, and only the earnings are distributed. Neither the principal nor earnings may be used to benefit any private individual, or to influence legislation or public opinion. The Fund is managed by the Endowment Fund Board elected by the Parish Assembly.

Today, the Endowment Fund continues to grow, thanks to the ongoing support of Parish members and friends, whose gifts, bequests, devises, and other contributions help secure the Church's future.

NAME
ADDRESS
CITY, STATE ZIP CODE

NON-
PROFIT
POSTAGE
INFO HERE

HOLY TRINITY GREEK ORTHODOX CATHEDRAL
3131 NE GLISAN STREET
PORTLAND, OR 97232

LEAVING A LEGACY FOR FUTURE GENERATIONS



THE ENDOWMENT FUND

HOLY TRINITY
GREEK ORTHODOX CATHEDRAL
OF PORTLAND, OREGON

HELP PROMOTE AND ACHIEVE OUR CHURCH'S RELIGIOUS, EDUCATIONAL & PHILANTHROPIC OBJECTIVES

Since its inception in 1998, the Endowment Fund has played a role in areas including the following:

- Hiring of a youth director.
- Support for the Agia Sophia Academy.
- Updating of the Sunday School curriculum, and on-going training of the Sunday School staff.
- Expansion of the Church Library's resources.
- Strengthening our Senior ministries.



For additional information regarding the Endowment Fund, please call Holy Trinity Greek Orthodox Cathedral at 503.234.0468.

THERE ARE MANY WAYS TO GIVE. WHICH ONE IS RIGHT FOR YOU?

CASH DONATION—The easiest and most popular method of supporting the Endowment Fund.

MEMORIAL—Celebrate or honor the lives of family members or friends, recognize their contributions to the community, or mark important events in their lives with a memorial gift to the Endowment Fund.

A BEQUEST IN YOUR WILL—A bequest to the Endowment Fund through your will — the most common planned gift— is simple and easy, and one that can provide you with valuable estate tax savings.

LIFE INSURANCE—Make a sizable contribution through an existing or new life insurance policy, when it's no longer needed for your family's protection, by designating the Endowment Fund as your beneficiary. The premiums are tax deductible.

CHARITABLE ANNUITY TRUST—Rather than selling low-yielding assets like real estate or securities that have appreciated in value, donating them to a Charitable Annuity Trust can help you avoid income and estate gift taxes, while still receiving income from a valuable asset during your lifetime.

CHARITABLE LEAD TRUST—For large estates, establishing a Charitable Lead Trust during your lifetime, or as a testamentary trust through your will, may help you reduce or avoid estate and gift taxes while transferring assets to children or grandchildren. The trust pays the Endowment Fund a stream of tax-deductible income for a specified number of years before being transferred to your beneficiaries.

CHARITABLE ANNUITIES—A charitable annuity allows you to contribute assets to the Endowment Fund and get a charitable deduction. In turn, the Endowment Fund provides you with a guaranteed income stream for life.

This brochure describes various ways to support the Endowment Fund. It is not intended as financial or legal advice for you or your family. Please consult a qualified professional for appropriate estate planning, legal and tax advice.