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## *Operational Guidelines*

*The Trinity Lutheran Church Endowment Fund is intended to support the various missions and ministries of the church in a manner above and beyond what is possible through the annual church budget. It is expected enriched and enhanced ministries will be made possible due to the Fund and its donors.*

*The church Trust committee will have fiduciary responsibility for the operation of the Fund. This includes ensuring Fund policies are adhered to and adjusted as necessary for the benefit of the fund and to honor the intent of donors.*

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## *Operational Procedures*

*The Fund will receive both current and planned gifts including cash, equities, real estate and other gifts of value. Non-cash gifts will be sold as soon as possible to best reflect the value of the gift when first received by the Fund.*

*Fund assets will be invested in equities, fixed income and other instruments that are best suited to provide a reasonable return while preserving and growing capital. The overall portfolio will be balanced and conservative in approach.*

*The Trust committee will determine an annual distribution percentage, typically in the range of 4 to 5 % of the fund balance. On the event of a negative annual return, the Trust committee may decide to forego the annual distribution.*


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## *Donors*

*Donors will have the option to create named funds (memorial or honorarium) with gifts of \$10,000 or more to the Fund. Named fund donors also have the option to direct named fund distributions to a general fund which will be allocated by the Trust committee or to support enriched and enhanced programming in a ministry of their choice (evangelism, faith formation, social and eco justice, worship, property).*

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*Trinity Lutheran Church  
Trust Fund*



*Endowment Fund*

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*Trinity Lutheran Church  
Trust Fund*

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