

# Trinity Lutheran Church Endowment Fund

## Initial Gift Application

Application Deadline - November 1

Fund disbursements will follow approval by the congregation at the  
Congregation's Annual Meeting

**Must be a Trinity Lutheran Church member to apply**

**Name** \_\_\_\_\_

**Phone and email** \_\_\_\_\_

Recipient Application Category

(choose only one and attach a **Statement of Intent**--see back)

1. Trinity Member (may be self) \_\_\_\_\_

Purpose \_\_\_\_\_

2. Trinity Church \_\_\_\_\_

Purpose \_\_\_\_\_

**SIGNATURE** \_\_\_\_\_

**Application may be followed by a personal interview with the Endowment  
Committee**

**(Except in emergencies, fund disbursements under #1 will not be made to the  
individual, but rather to camp, college, utility, or other approved purpose)**

Completed forms may be hand-delivered to Kris Mattson, Christine Anderson or Wayne  
Kendrick, Committee Members

OR e-mailed to Christine at [smilechan@hotmail.com](mailto:smilechan@hotmail.com)

OR mailed to church at 2532 15<sup>th</sup> St., Cumberland, WI 54829

## **Statement of Intent**

Write a few sentences explaining how the funds will be spent and what impact it will have on you and/or Trinity. Attach additional pages if needed.

### **Expected Timeline:**

- **November:** Endowment Committee reviews applications and makes recommendations for awards to the council. An endowment committee member may call the applicant(s) to ask follow-up questions if needed and/or inform them of the decision.
- **December:** Church Council reviews Endowment Committee recommendation and approves or disapproves.
- **January:** The Endowment recommendations that are approved by the Church Council are heard by and voted on by the congregation at the annual meeting.
- **February:** The Endowment committee contacts the applicant(s) to inform of the congregation's decision. The committee requests the money from the investment company that manages the endowment funds.
- **Late February or March:** the money becomes available to the recipient. A member of the Endowment Committee will follow up with details for where to send the awarded gift. Please note that unless it is an emergency the funds will not be dispersed to the recipient directly, but to the agency, school, utility, camp or other entity.
- **If chosen for an award:** Please write a thank you letter to the congregation after receiving the gift. The letter will be shared with the congregation and published in a church newsletter.