



Great Commission Fund Application

Please complete this application to establish a Great Commission Fund with The Cru Foundation. Please send the completed application to our office by email, mail or fax. info@crufoundation.org 407 541-5106

Fund Name

Fund Name (for example The Paul and Mary Owens Giving Fund or The Mustard Seed Fund)

Fund Advisors

Primary Fund Advisor

Additional Fund Advisor

Address

Address

City

State

Zip

City

State

Zip

Home Phone

Cell Phone

Home Phone

Cell Phone

Email Address

E-mail address

Professional Advisor (if applicable)

Professional Advisor

Address

City

State

Zip

Work Phone

Cell Phone

Email Address

Advisor may have: Full Access, Limited Access or Viewing rights. Please fill in which level you would like them to have.

Succession Planning Options

Option A – You may include up to four successor advisors who will give us instructions on how to distribute the remaining funds in your Great Commission Fund.

Successor Advisor			Successor Advisor		
Address			Address		
City	State	Zip	City	State	Zip
Home Phone		Cell Phone	Home Phone		Cell Phone
Email Address			E-mail address		

Successor Advisor			Successor Advisor		
Address			Address		
City	State	Zip	City	State	Zip
Home Phone		Cell Phone	Home Phone		Cell Phone
Email Address			E-mail address		

Option B – Please list the beneficiaries that you would like us to distribute the remaining funds in your Great Commission Fund to. Please list a percentage for each that all add up to 100%.

Ministry Name & Contact Person	Address	Phone	Percentage

Contribution

Type of Asset	Asset Value	Cost Basis
Cash_____		
Stock or Mutual Fund_____		
Description:_____		
Real Estate_____		
Description:_____		
Gold or silver_____		
Description:_____		
Bequest_____		
Other_____		

Investment Options

If your contribution is more than \$200,000 you may recommend an investment allocation.

- Ultra Conservative (100% Cash)
- Conservative (15% Cash 85% Fixed)
- Moderate (45% Equities, 55% Fixed)
- Growth (60% Equities, 40% Fixed)

