



# ESTATE DESIGN & GIFT PLANNING

Cru Foundation provides personalized guidance to **help you develop a thoughtful, faith-driven approach to stewardship**. The Gift and Estate Design process coordinates the skills of your professional service advisors with our unique expertise in charitable law, tax-advantaged giving strategies, and kingdom-minded charitable planning solutions.

## WHAT YOU CAN EXPECT

### FAITH-BASED, VALUES-ALIGNED SPECIALISTS

Our experienced gift and estate design specialists share your Christian values and heart for advancing the Great Commission.

### A STEWARD'S PERSPECTIVE

We approach estate design through the lens of God's ownership—prioritizing people over possessions and seeking to strengthen family relationships through intentional and professional planning.

### CONFIDENTIAL, NO-OBLIGATION SERVICES

We are here to serve. That means no fees, no commissions, and no products—just guidance. Your information is always handled with care and complete confidentiality.

## BENEFITS FOR YOUR FAMILY

- Achieve your personal and family financial goals while protecting relationships
- Reduce or potentially eliminate taxes
- Transfer the right assets to the right people, in the right way
- Maximize tax-advantaged giving for Kingdom impact
- Accelerate the fulfillment of the Great Commission



100 Lake Hart Drive, #3600 • Orlando, FL 32832 • (800) 449-5454 • Fax (407) 541-5106  
www.crufoundation.org • hello@crufoundation.org

Accelerating the Great Commission through *smarter generosity*.

Cru Foundation provides information and assistance related to estate design and gift planning. Communications with our staff are not intended as, nor should they be construed to be, legal or tax advice and are offered for educational purposes only. You should seek legal and/or tax advice from your professional advisors prior to making any planned gift.



## OUR SERVICES

### PERSONAL ESTATE DESIGN

Clarify your goals and develop practical strategies that consider relational, tax, and legal outcomes—all communicated in clear, accessible language.

*You'll walk away with a defined path forward, including:*

- A “blueprint” for a new will or trust
- Recommendations if you are updating an existing plan
- Strategies to improve your overall position through tax-efficient planning

### INDIVIDUAL GIFT DESIGN

Experience the joy of giving through thoughtfully structured lifetime gifts. We help you make the most of available tools and tax-wise strategies as a Kingdom-minded steward.

*Through custom illustrations and scenario planning, you'll see how to:*

- Multiply your impact
- Unlock the potential of tax-advantaged assets such as real estate, business interests, retirement assets and appreciated securities

## NEXT STEPS

To learn more, connect with a gift and estate design specialist by calling 1-800-449-5454 or emailing us at [hello@crufoundation.org](mailto:hello@crufoundation.org)

**PLEASE REACH OUT WITH ANY QUESTIONS. WE LOOK FORWARD TO SERVING YOU.**



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