

# CHARITABLE REMAINDER TRUST SUMMARY



FULL NAME:

BIRTHDATE:

SPOUSE'S FULL NAME:

BIRTHDATE:

STREET ADDRESS:

CITY:

STATE:

ZIP CODE:

TELEPHONE:

EMAIL:

FUNDING ASSET:  Cash  Securities  Real Estate  Other:

FAIR MARKET VALUE

COST BASIS

DISTRIBUTION: INCOME NEEDED ANNUALLY (AFTER TAX) \$

START DISTRIBUTION:  Immediately  At Trigger Event  At age:

START DISTRIBUTION DETAIL:

CRT Type:  Fixed income (annuity trust)  Variable income (unitrust)

PAYABLE TO:

PAYABLE TO PERSON(S) NAMED ABOVE:  For Life  A term of years  # of years (up to 20)

TRUSTEE:

Accelerating the Great Commission through *smarter generosity*.

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

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WILL PAYMENTS BE EXTENDED TO HEIRS (10 years max subject to rules)?

Yes  No

IF SO, NAME THE INDIVIDUALS:

<input type="text"/>	DOB:	<input type="text"/>
<input type="text"/>	DOB:	<input type="text"/>
<input type="text"/>	DOB:	<input type="text"/>
<input type="text"/>	DOB:	<input type="text"/>

CHARITABLE REMAINDER BENEFICIARIES:

NAME	MINISTRY POINT OF CONTACT	PHONE/ADDRESS	DONATION %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

IS THEIR CRU FOUNDATION DAF A BENEFICIARY?

IF SO, THEIR GCDAF NAME IS:

DO THEY HAVE AN UPDATED SUCCESSION PLAN IN PLACE?  Yes  No

NOTES:

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