

FUND ACCOUNT SUCCESSION PLAN

To indicate your wishes for how your Fund account will be advised upon or managed after your incapacity or your passing, please choose one of the options below. Once signed & dated, remit to Cru Foundation by email or secure transfer at crufoundation.wetransfer.com. We will keep your most recent instructions on file. *(Should you need additional space, please attach another paper.)*

ADVISOR NAME:

CO-ADVISOR NAME:

FUND INFORMATION

FUND NAME:

My contact information has not changed *(skip field below)*

ADDRESS:

HOME PHONE:

CELL PHONE:

EMAIL:

PLEASE CHOOSE ONLY ONE OF THE FOLLOWING OPTIONS:

OPTION #1: NAME FUND SUCCESSOR ADVISORS

- I would like any remaining funds to be advised upon by the following successor advisors, sharing advisory responsibilities.
- I would like any remaining funds divided equally into separate accounts with the following successor advisors. *(Resulting accounts must have a beginning balance of at least \$5,000.)*

SUCCESSOR ADVISOR #1

RELATIONSHIP

ADDRESS:

PHONE:

EMAIL:

SUCCESSOR ADVISOR #2

RELATIONSHIP

ADDRESS:

PHONE:

EMAIL:

FUND ACCOUNT SUCCESSION PLAN

SUCCESSOR ADVISOR #3

RELATIONSHIP

ADDRESS:

PHONE:

EMAIL:

SUCCESSOR ADVISOR #4

RELATIONSHIP

ADDRESS:

PHONE:

EMAIL:

OPTION #2: DESIGNATE IMMEDIATE CHARITABLE BENEFICIARIES

I advise the remaining funds to be distributed to the charities listed below as soon as practically possible.

MINISTRY #1 NAME

TAX ID (if known)

ADDRESS:

CONTACT PERSON/PHONE:

EMAIL:

GRANT PURPOSE:

PERCENTAGE:

MINISTRY #2 NAME

TAX ID (if known)

ADDRESS:

CONTACT PERSON/PHONE:

EMAIL:

GRANT PURPOSE:

PERCENTAGE:

FUND ACCOUNT SUCCESSION PLAN

MINISTRY #3 NAME

TAX ID (if known)

ADDRESS:

CONTACT PERSON/PHONE:

EMAIL:

GRANT PURPOSE:

PERCENTAGE:

MINISTRY #4 NAME

TAX ID (if known)

ADDRESS:

CONTACT PERSON/PHONE:

EMAIL:

GRANT PURPOSE:

PERCENTAGE:

MINISTRY #5 NAME

TAX ID (if known)

ADDRESS:

CONTACT PERSON/PHONE:

EMAIL:

GRANT PURPOSE:

PERCENTAGE:

MINISTRY #6 NAME

TAX ID (if known)

ADDRESS:

CONTACT PERSON/PHONE:

EMAIL:

GRANT PURPOSE:

PERCENTAGE:

FUND ACCOUNT SUCCESSION PLAN

MINISTRY #7 NAME

TAX ID (if known)

ADDRESS:

CONTACT PERSON/PHONE:

EMAIL:

GRANT PURPOSE:

PERCENTAGE:

MINISTRY #8 NAME

TAX ID (if known)

ADDRESS:

CONTACT PERSON/PHONE:

EMAIL:

GRANT PURPOSE:

PERCENTAGE:

TOTAL PERCENTAGE:
(must equal 100%)

OPTION #3: CHARITABLE GRANTS OVER TIME

I advise the remaining funds to be distributed to the charities listed below over time. I advise Cru Foundation to grant 5% of the annual account balance of the fund to the organizations named below in the percentages indicated. Grants will generally continue to be made so long as the Fund can support the minimum grant amounts Cru Foundation allows at that time, or until the fund balance drops below \$5,000.

(List ministries on following page)

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MINISTRY #1 NAME

TAX ID (if known)

ADDRESS:

CONTACT PERSON/PHONE:

EMAIL:

GRANT PURPOSE:

PERCENTAGE:

MINISTRY #2 NAME

TAX ID (if known)

ADDRESS:

CONTACT PERSON/PHONE:

EMAIL:

GRANT PURPOSE:

PERCENTAGE:

MINISTRY #3 NAME

TAX ID (if known)

ADDRESS:

CONTACT PERSON/PHONE:

EMAIL:

GRANT PURPOSE:

PERCENTAGE:

MINISTRY #4 NAME

TAX ID (if known)

ADDRESS:

CONTACT PERSON/PHONE:

EMAIL:

GRANT PURPOSE:

PERCENTAGE:

FUND ACCOUNT SUCCESSION PLAN

MINISTRY #5 NAME

TAX ID (if known)

ADDRESS:

CONTACT PERSON/PHONE:

EMAIL:

GRANT PURPOSE:

PERCENTAGE:

MINISTRY #6 NAME

TAX ID (if known)

ADDRESS:

CONTACT PERSON/PHONE:

EMAIL:

GRANT PURPOSE:

PERCENTAGE:

TOTAL PERCENTAGE:
(must equal 100%)

OPTION #4

I choose not to name a successor advisor or to advise Cru Foundation on any aspect of the remaining funds. I understand that Cru Foundation will continue to manage, grant, invest, or otherwise use the funds at its discretion without my advice or that of a successor advisor.

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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SIGNATURES

All contributions to the Cru Foundation are income tax-deductible. They are made with the understanding that the Cru Foundation has exclusive legal control over the assets contributed to the Great Commission Donor Advised Fund and the foundation.

PRIMARY FUND ADVISOR SIGNATURE

DATE

ADDITIONAL FUND ADVISOR SIGNATURE

DATE

To help you prepare, please inquire about our additional resources related to how to add Cru or your Fund Account to your estate plans. Request our Basic Estate Planning Guide, which lists suggested documents to gather for your estate planning process. Lastly, we welcome your phone call with any questions or to have a confidential, no-obligation conversation.

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