

GREAT COMMISSION DONOR ADVISED FUND APPLICATION



Please complete this application to establish a Great Commission Donor Advised Fund (Fund) with the Cru Foundation. Please note that any information can be revised or added later.

FUND NAME:

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

HOW DID YOU HEAR ABOUT THE GREAT COMMISSION DONOR ADVISED FUND?

- | | |
|----------------------------------|---|
| ☐ Mailing | ☐ Financial Advisor/CPA/Accountant |
| ☐ Friend | ☐ Cru Ministry Rep or Missionary |
| ☐ Other: | <input type="text"/> |

PRIMARY FUND ADVISOR

NAME:

ADDRESS:

PHONE NUMBER:

EMAIL:

ADDITIONAL FUND ADVISOR

NAME:

ADDRESS:

PHONE NUMBER:

EMAIL:

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INTERESTED PARTY:

(Information Only Access — ex.: professional advisor, pastor, friend, etc.)

NAME:

ADDRESS:

PHONE NUMBER:

EMAIL:

RELATIONSHIP TO FUND ADVISORS:

CONTRIBUTION TO FUND THE NEW GREAT COMMISSION DONOR ADVISED FUND:

TYPE OF ASSET	ASSET VALUE	COST BASIS
CASH		
STOCK OR MUTUAL FUND (please request our transfer instructions)		
REAL ESTATE (early notice and conversations required)		
BEQUEST		
OTHER		

INVESTMENT OPTIONS

YOU MAY RECOMMEND AN INVESTMENT ALLOCATION. IF NO RECOMMENDATION IS MADE, CRU FOUNDATION WILL MAKE THE SELECTION. *For help with your selection, view our questionnaire.*

- ☐ Ultra Conservative
(100% Cash)
- ☐ Conservative
(0% equity, 100% fixed income + cash)
- ☐ Moderate Conservative
(20% equity, 80% fixed income + cash)
- ☐ Moderate
(40% equity, 60% fixed income + cash)
- ☐ Growth
(60% equity, 40% fixed income + cash)
- ☐ Aggressive
(70% equity, 30% fixed income + cash)

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CHARITIES — POTENTIAL GIFT RECIPIENTS:

Please list the charities outside of Cru to which you likely plan to advise gifts. This information helps us review your grantees in advance. You may easily add or change recommended grantees at any time once the Fund account is established.

(Please email info@crufoundation.org to request an additional form if more space is needed.)

MINISTRY NAME #1

ADDRESS:

PHONE NUMBER:

WEBSITE:

TAX ID NUMBER:

MINISTRY NAME #2

ADDRESS:

PHONE NUMBER:

WEBSITE:

TAX ID NUMBER:

MINISTRY NAME #3

ADDRESS:

PHONE NUMBER:

WEBSITE:

TAX ID NUMBER:

MINISTRY NAME #4

ADDRESS:

PHONE NUMBER:

WEBSITE:

TAX ID NUMBER:

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SUCCESSION PLANNING

Succession plans advise Cru Foundation about what to do with assets in the Fund account after you and any other Primary Fund advisor(s) pass away or when you are unable to advise the Fund. You may choose one of the following three Succession

Planning options—*Successor Advisors, Charitable Beneficiaries, or a Legacy Grant Plan.*

1 SUCCESSOR ADVISORS:

You may include up to four successor advisors who will advise the distribution of the remaining funds in the account.

☐ I recommend any remaining funds be divided equally into separate accounts with the following advisors.

SUCCESSOR ADVISOR #1

RELATIONSHIP:

ADDRESS:

PHONE NUMBER:

EMAIL:

SUCCESSOR ADVISOR #1

RELATIONSHIP:

ADDRESS:

PHONE NUMBER:

EMAIL:

SUCCESSOR ADVISOR #1

RELATIONSHIP:

ADDRESS:

PHONE NUMBER:

EMAIL:

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2 CHARITABLE BENEFICIARIES:

If you would like to advise that remaining assets be distributed immediately, please list below the recommended charities and percentages. **Please ensure the total distributions equal 100%.**

MINISTRY NAME #1

WEBSITE:

ADDRESS:

PHONE NUMBER:

TAX ID NUMBER:

PERCENTAGE:

MINISTRY NAME #2

WEBSITE:

ADDRESS:

PHONE NUMBER:

TAX ID NUMBER:

PERCENTAGE:

MINISTRY NAME #3

WEBSITE:

ADDRESS:

PHONE NUMBER:

TAX ID NUMBER:

PERCENTAGE:

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3 LEGACY GRANT PLAN

A Legacy Grant Plan establishes recurring grants of at least \$500 based on a percentage of the remaining account balance for a period of years. Please contact us after the Fund has been established to set up this customized option.

SIGNATURES

I acknowledge that I and any additional Fund advisors have read the Great Commission Donor Advised Fund Agreement as well as the Great Commission Donor Advised Fund Program Guidelines, both of which are attached below and agree to the terms and/or conditions described therein. All contributions to the Cru Foundation are income tax-deductible and are made with the understanding that the Cru Foundation has complete discretion and control over the use of all donated funds.

PRIMARY FUND ADVISOR SIGNATURE:

DATE

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