

Great Commission Donor Advised Fund Application

Please complete this application to establish a Great Commission Donor Advised Fund (Fund) with The Cru Foundation. Please send the completed application by email, mail or fax at info@crufoundation.org or 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		

Interested Party (Access to account is informational only.)

Name		
Address		
City	State	Zip
Work Phone		Cell Phone
Email Address		
Relationship to Fund Advisors		

Contribution

Type of Asset

Asset Value

Cost Basis

Cash _____ N/A

Stock or Mutual Fund _____

Description: _____

Real Estate _____

Description: _____

Gold or silver _____

Description: _____

Bequest _____

Other _____

Investment Options

If your initial contribution is more than \$200,000 you may recommend an investment allocation. Contributions less than \$200,000 will be invested in the Conservative pooled account.

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

Charities - Potential Gift Recipients

Please list the charities outside of Cru to which you plan to make gifts. This information helps us review and approve your grantees. You may change recommended grantees at any time.

Ministry Name _____ Address _____ Phone _____

Contact Person _____ Tax I.D. Number _____

Ministry Name _____ Address _____ Phone _____

Contact Person _____ Tax I.D. Number _____

Ministry Name	Address	Phone
Contact Person	Tax I.D. Number	

Ministry Name	Address	Phone
Contact Person	Tax I.D. Number	

Ministry Name	Address	Phone
Contact Person	Tax I.D. Number	

Succession Planning

You may choose one of the following three Succession Planning options.

1) **Successor Advisors**

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

☐ I would like any remaining funds divided equally into separate accounts with the following advisors. (Resulting accounts must have a beginning balance of at least \$5,000.)

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

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

2) Charitable Beneficiaries

If you would like your remaining funds to be distributed immediately to your desired charities please list below the charities and percentages. Please ensure that the total distributions equal 100%.

Ministry Name	Address	Phone	Percentage
Contact Person		Tax I.D. Number	
Ministry Name	Address	Phone	Percentage
Contact Person		Tax I.D. Number	
Ministry Name	Address	Phone	Percentage
Contact Person		Tax I.D. Number	
Ministry Name	Address	Phone	Percentage
Contact Person		Tax I.D. Number	
Ministry Name	Address	Phone	Percentage
Contact Person		Tax I.D. Number	
Total Percentage (must equal 100%)			

3) Legacy Grant Plan

Establish recurring grants based on a percentage of the remaining account balance for a period of years or as long as the account balance can support \$500 grants. Please complete a *Legacy Grant Application*. www.crufoundation.org/wp-content/uploads/2019/0s/TCF-GCF-Legacy-Grant-Application-2019

Signatures

I acknowledge that I have read the Great Commission Donor Advised Fund Agreement (available at www.crufoundation.org/GCDFAgreement) and agree to the terms and/or conditions described therein. I have been provided a copy of the Complete Guide to Great Commission Funds (available at www.crufoundation.org/wp-content/uploads/2019/Complete-Guide-to-Great-Commission-Funds)

Primary Fund Advisor Signature

Date

Additional Fund Advisor Signature

Date

The Great Commission Foundation of Campus Crusade for Christ, Inc. D/B/A The Cru Foundation

By

Date

Name

Title