

## 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](mailto:info@crufoundation.org) or 407 541-5106.

### Fund Name

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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.)

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Name

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Address

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City State Zip

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Work Phone Cell Phone

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Email Address

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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)
- Aggressive (80% Equities, 20% 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
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Contact Person	Tax I.D. Number
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Ministry Name	Address	Phone
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Contact Person	Tax I.D. Number
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www.crufoundation.org • info@crufoundation.org

Ministry Name	Address	Phone
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Contact Person	Tax I.D. Number
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Ministry Name	Address	Phone
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Contact Person	Tax I.D. Number
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Ministry Name	Address	Phone
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Contact Person	Tax I.D. Number
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### 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	City
Home Phone	Cell Phone	Home Phone	Cell Phone
Email Address		E-mail address	

Successor Advisor	Relationship	Successor Advisor	Relationship
Address		Address	
City	State	Zip	City
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
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Contact Person	Tax I.D. Number
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Ministry Name	Address	Phone	Percentage
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Contact Person	Tax I.D. Number
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Ministry Name	Address	Phone	Percentage
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Contact Person	Tax I.D. Number
----------------	-----------------

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

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

## Signatures

I acknowledge that I have read the Great Commission Donor Advised Fund Agreement as well as The Great Commission Donor Advised Fund Program Guidelines (available here [www.crufoundation.org/wp-content/uploads/2021/04/GCDAF-Program-Guidelines-2021.pdf](http://www.crufoundation.org/wp-content/uploads/2021/04/GCDAF-Program-Guidelines-2021.pdf)) 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

\_\_\_\_\_  
Additional Fund Advisor Signature

\_\_\_\_\_  
Date