



Services for Christian Ministries and Organizations

“At a Glance”

- Family Legacy Planning and Charitable Giving Education
- Start a Legacy Initiative at your Church or Charity
- Estate Planning for Charitable Planned Giving
- Charitable Trust Administration as Trustee
- Charitable Gift Annuity Administration
- Donor Advised Funds and Field of Interest Funds
- Endowment/Long Term Funds Investment Management

Estate Planning and Planned Giving Services

- Donors give more with Planning! Help donors learn “What’s Possible” with creative, tax-smart charitable giving ideas.
- CFA works behind the scenes with your gift planners, or alongside them on your behalf.
- Giving tools include Donor Advised Funds, Charitable Trusts, and other creative plans.
- CFA handles complex gifts such as securities, real estate, restricted stock, business interests, etc.

Contact us today to learn more! We can come along side to provide these specialized services so you can serve your Donors more effectively.