HOW WATERSTONE SERVES
SERVING GIVERS AT THE INTERSECTION OF FAITH AND FINANCE
DESIGNING
INNOVATIVE GIVING SOLUTIONS

MULTIPLYING
THE IMPACT OF GIVING

MINIMIZING
TAXES

HEIGHTENING
THE JOY OF GENEROSITY
IDENTIFY FUNDING OPTIONS
Cash, securities, real estate, business interests, oil & gas or agricultural commodities

UTILIZE APPRECIATED ASSETS FOR GIVING
Capital gains taxes are optional

IMMEDIATE TAX DEDUCTION
When you give through appreciated assets you receive an immediate income tax deduction based on the fair market value of the asset.

ORGANIZE YOUR GIVING AROUND A PURPOSE
Create a purpose for your giving vehicle to ensure grants are given to causes you care about
INVESTMENT OF ASSETS
Watch your Giving Fund grow through investment management of the assets

CHOOSE A POOL
Choose an investment pool that matches your investment philosophy

RECOMMEND AN ADVISOR
For qualified accounts, recommend your personal advisor to manage the Giving Fund

IMPACT INVESTMENTS
Consider adding Alternative and Impact Investments
GRANT

ADVANTAGES

RECOMMEND GRANTS ON YOUR TIMELINE
Grants can be requested online 24/7 or by phone

NO ANNUAL DISTRIBUTION REQUIREMENTS OR DEADLINES

SINGLE SOURCE FOR ALL TRANSACTIONS

GIVE ANONYMOUSLY
To retain full privacy, if desired
BECOME TAX-SAVVY.
Givers and their advisors can count on WaterStone for cutting-edge tax-advantaged giving strategies.

TAP INTO COMPLEX ASSETS.
By gifting out of non-cash assets, givers can multiply their giving impact, minimize taxes, and heighten the joy of generosity.

TREAT GIVING LIKE A BUSINESS.
WaterStone helps givers by applying standard business practices like planning, counsel, due diligence and accountability.

GET SMART.
By incorporating WaterStone’s expertise in innovative giving solutions, givers enjoy significant economic benefits and can share more with their preferred charities.
THE UNSEEN OPPORTUNITY

The bulk of your wealth is likely comprised of complex assets.

Through WaterStone, families can multiply their giving impact by transforming complex assets into living water.

**CASH**
- **44%**

**MARKETABLE SECURITIES**
- **35%**

**REAL ESTATE**
- **21%**

**PRIVATE STOCK**
- **12%**

**OIL & GAS AND AGRICULTURAL COMMODITIES**
- **21%**

**LIFE INSURANCE**
- **2%**

**NON-CASH**
- **56%**
Since 1980

$950M Contributions

Over $500M Complex Assets Contributions

$600M Grants

Nearly $500M in Assets Under Advisement

Up 42% over last year

Over 5,000 Charities Supported

Averaging $1M in Grants Weekly

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