



PARTNER WITH WATERSTONE

AN EBOOK FOR ADVISORS:
ADDING VALUE THROUGH GIVING SERVICES

3 REASONS

TO GET ON BOARD WITH CHARITABLE SOLUTIONS

1. Giving impacts several key areas of wealth management: tax, estate, business, investment and retirement planning.
2. Understanding how to process complex assets utilizing Charitable Solutions will benefit your clients while setting your firm apart from others.
3. With Charitable Solutions, you can better advise those clients who are entrepreneurs, stewards of family wealth, owners of businesses, oil & gas and agricultural commodities.

We invite you to join the WaterStone community of giving and encourage you to explore the resources WaterStone offers.



CLIENTS NEED YOUR ADVICE

91% DONATED
TO CHARITY

94% Want to be MORE KNOWLEDGEABLE
about charitable giving

CLIENTS AREN'T CAPITALIZING ON INNOVATIVE GIVING STRATEGIES

47% of WEALTHY DONORS ARE AWARE
of innovative ways to use their assets in giving

23.5% of wealthy donors have used or PLANNED TO USE a
giving vehicle to achieve their charitable goals



YOUR CLIENTS ARE LOOKING FOR ADVICE

WHO ARE
CLIENTS ASKING
FOR ADVICE?*

1. ACCOUNTANT (10%)
2. FINANCIAL/WEALTH ADVISOR (7%)
3. NONPROFIT PERSONNEL (6%)

*2016 U.S. TRUST STUDY OF HIGH NET WORTH PHILANTHROPY



THE WATERSTONE TEAM



KEN HARRISON

CEO

- 20 years commercial real estate business owner
- CEO of Iomnis Professional Solutions
- Author and corporate speaker



JOHN MULDER

CHIEF OPERATING OFFICER/PRESIDENT

- 22 years banking executive
- CEO of U.S. Bank and Technology Concepts



CHRIS START

VP OF FINANCE & ADMINISTRATION

- CPA
- 6 years at Procter & Gamble
- 10 years at Northern Trust Bank



TERRY CARGILL

VP OF GENEROSITY

- 30 years in banking
- Managing Director for J.P. Morgan Chase



STACY WESTOVER

VP OF SPECIAL COUNSEL

- Juris Doctor
- Estate planning attorney

OVER 100 YEARS OF BANKING/WEALTH MANAGEMENT EXPERIENCE

HONORING GOD
SERVING GIVERS
BUILDING THE KINGDOM



SINCE
1980

BEHIND EVERY
NUMBER IS A STORY

\$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

CONTACT US



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