



PLANNED GIVING

AN EBOOK ON MAXIMIZING YOUR PLANNED GIFT

WHAT IS CHARITABLE GIVING?



When Jesus sent out his disciples to share his good news, he reminded them:

“FREELY YOU HAVE RECEIVED; FREELY GIVE.” (MATTHEW 10:8)

Paul echoes this message in reminding the church: “Remember this: Whoever sows sparingly will also reap sparingly, and whoever sows generously will also reap generously. Each of you should give what you have decided in your heart to give, not reluctantly or under compulsion, for God loves a cheerful giver”

(2 Corinthians 9:7).

While people of all walks of life can be generous, charitable giving is unique because:

- It is the Christian’s genuine response to Jesus’ own gift
- It is cheerful, growing out of joy, not guilt or compulsion
- It is thoughtful

COMMON WAYS TO GIVE INCLUDE:



SPONTANEOUS GIVING

It occurs when a giver sees an immediate opportunity and gives on the spot. It could be a homeless person on the street with a sign or a special collection at church. These emotional responses reflect a cheerful giver.



DONATING ITEMS

When disaster strikes, givers look for an opportunity to share. They might donate canned food or gently used clothing. While it is important to help with emergencies, a giver should always find ways to give strategically as they support their passions.



PRIVATE FOUNDATIONS

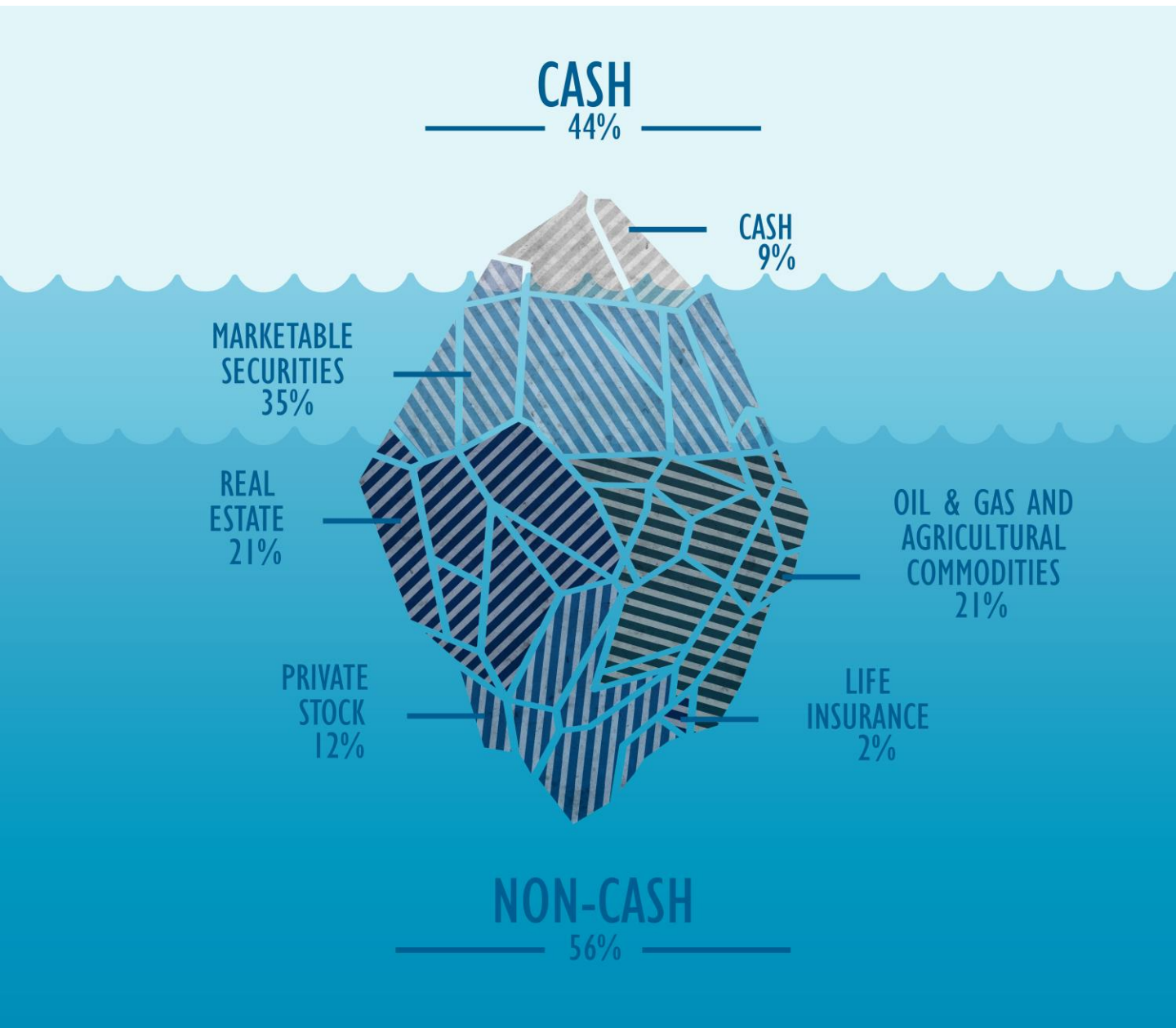
Wealthy individuals often set up private foundations to facilitate their giving. Due to IRS regulation, private foundations are time-consuming and burdened with high administrative requirements. Ironically, they end up being not private at all since everything done through this vehicle is a matter of public record. This complexity distracts from the giver's simple desire to be generous.

WaterStone's mission is to provide giving solutions and strategies through trusted advice and technical expertise. We partner with you and your advisors to help you become a more effective giver and maximize the impact of your giving. Together, we'll develop a strategy to transform your assets into a vehicle for blessing those causes that matter to you.

THE UNSEEN OPPORTUNITY

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

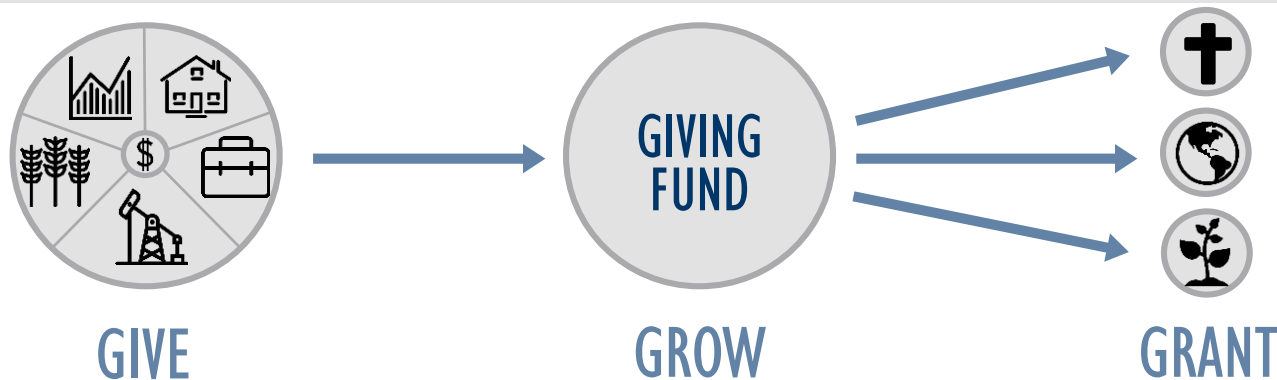
Through WaterStone, families can multiply their giving impact by transforming complex assets into living water.



WATERSTONE'S WISE SOLUTIONS

GIVING FUND

A WATERSTONE GIVING STRATEGY



ADVANTAGES

STEPS

ASSETS

Cash Securities
Real Estate Business
Oil & Gas Agriculture

TAX SAVINGS

Simple or Complex Assets
Immediate Tax Deduction

FLEXIBLE

Give on Your Timeline
Choose an investment option

PRIVACY

Option for Anonymous Giving

LEGACY

Training Ground for Generosity
Name a Successor Advisor

1. Give gifts of appreciated assets to your WaterStone fund.
2. Receive an immediate tax deduction.
3. Select an investment option: choose from a WaterStone investment pool or recommend you own investment advisor.
4. Recommend grants through your Giving Fund.

THE WATERSTONE TEAM



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HONORING GOD

SERVING GIVERS

BUILDING THE KINGDOM

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