WHO IS WATERSTONE
AN EBOOK ABOUT OUR VISION AND MISSION
**WHO IS WATERSTONE**

**WATERSTONE**

**John 4:10**
“Jesus answered her, ‘If you knew the gift of God and who it is that asks you for a drink, you would have asked him and he would have given you **LIVING WATER**.’”

**Joshua 4**
“In the future, when your children ask you, ‘What do these stones mean?’ tell them that the flow of the Jordan was cut off before the ark of the covenant of the **LORD**. When it crossed the Jordan, the waters of the Jordan were cut off. **THESE STONES ARE TO BE A MEMORIAL TO THE PEOPLE OF ISRAEL FOREVER.**”

**VISION**
Every Christian a faith-filled intentional giver

**MISSION**
Honoring God
Serving Givers
Building the Kingdom

**VALUES**
Christ-centered: Love | Integrity | Service

WaterStone is blessed to be called by the Lord to be part of this Kingdom giving project. WaterStone is all about giving. We strive to honor God by providing expertise to the Christian community on how to give intentionally.

At the heart of our mission, we educate and equip givers to help direct vital financial support to the churches, ministries and charities that do the Lord’s work every day.
HONORING GOD

At WaterStone, we honor God through

THE TRANSFORMATIONAL POWER OF GIVING.

Jesus spoke of giving clearly and simply:

“IT IS MORE BLESSED TO GIVE THAN TO RECEIVE.”

ACTS 20:35

When we give, we reflect the character of God. God is both the first and the foremost giver. After all, “For God so loved the world, that he gave his only Son, that whoever believes in him should not perish but have eternal life” (John 3:16).

SERVING GIVERS

WE SERVE GIVERS AT THE

INTERSECTION OF FAITH & FINANCE

Through giving we express our faith and knowledge that God owns it all. Through giving we trust that he will provide us all that we require.

WaterStone serves givers by helping them:

CREATE A LEGACY OF GIVING
The third leg of our mission is building the Kingdom. We unlock the giving potential of our community of faith by **TRANSFORMING ASSETS INTO LIVING WATER**, water that gives life to those churches, ministries and charities that our givers choose to support.

WaterStone’s goal is to connect givers, their advisors and ministries to release more to Kingdom causes. By convening and nurturing a community of giving, WaterStone honors God by serving his people.
<table>
<thead>
<tr>
<th>Comparison</th>
<th>WaterStone Giving Fund</th>
<th>Private Foundation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AGI Tax Deduction Limitation - Cash</strong></td>
<td>50%</td>
<td>30%</td>
</tr>
<tr>
<td><strong>AGI Tax Deduction Limitation – Long Term Capital Gain Property</strong></td>
<td>30%</td>
<td>20%</td>
</tr>
<tr>
<td>(Publicly-traded Stock, Closely-held Stock, and Real Estate)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Gifts of Qualified Appreciated Securities</strong></td>
<td>Fair Market Value Deduction</td>
<td>Fair Market Value Deduction</td>
</tr>
<tr>
<td>(i.e. Publicly-traded Stock)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Gifts of Real Estate or Closely-held Stock</strong></td>
<td>Fair Market Value Deduction</td>
<td>Cost Basis Deduction</td>
</tr>
<tr>
<td><strong>Privacy/Confidentiality</strong></td>
<td>Yes</td>
<td>No; Disclosure of IRS Form 990PF is Required</td>
</tr>
<tr>
<td><strong>Excise Taxes on the Sale of Highly Appreciated Gifts</strong></td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Annual Excise Tax Payments</strong></td>
<td>None</td>
<td>1-2% of Net Income and Net Realized Gains</td>
</tr>
<tr>
<td><strong>Ease and Cost of Establishing a Charitable Entity or Fund</strong></td>
<td>Simple, No Cost</td>
<td>Complex Legal Expenses and IRS 1023 Application Fees and Expenses</td>
</tr>
<tr>
<td><strong>Annual Minimum Distribution Requirement</strong></td>
<td>None</td>
<td>5%</td>
</tr>
<tr>
<td><strong>General Administration</strong> (Investments, accounting, audit, and tax returns)</td>
<td>All financial and administrative management provided</td>
<td>Trustees must perform, contract, or hire all staff</td>
</tr>
<tr>
<td><strong>Grant Administration</strong></td>
<td>Donor recommends distributions to favorite ministries and charities based on personal favorites</td>
<td>Foundation must support its own grantmaking</td>
</tr>
<tr>
<td>WaterStone ensures recipients are qualified</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Personal Service by a Mission-based Organization</strong></td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>
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

CONTACT US

WaterStone
10807 New Allegiance Drive
Suite 240
Colorado Springs, CO 80921

P: 719-447-4620
F: 719-447-4700

www.waterstone.org

waterstone@waterstone.org