



# WHO IS WATERSTONE

AN EBOOK ABOUT OUR VISION AND MISSION

# WHO IS WATERSTONE

## WATER

## STONE

### 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:

We help families define and create a legacy of giving. In that legacy is the conviction that we are called to be good and faithful stewards of all that the Lord entrusts to us.

## CREATE A LEGACY OF GIVING



# BUILDING THE KINGDOM

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.



REAL ESTATE



BUSINESS



OIL & GAS



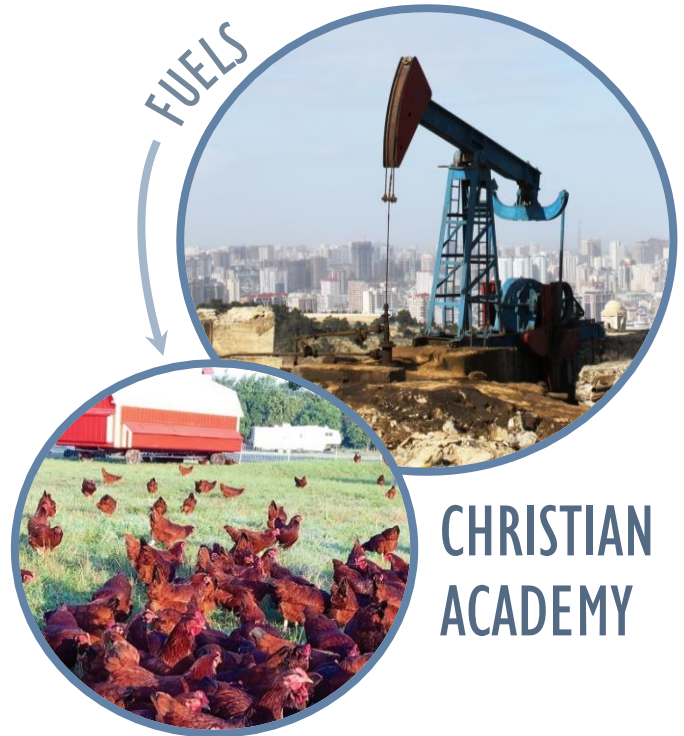
AGRICULTURAL  
COMMODITIES

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.

## GIFT OF GRAIN



## OIL WEALTH



**TRANSFORMING ASSETS INTO LIVING WATER**



# PUBLIC vs PRIVATE FOUNDATIONS

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



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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