



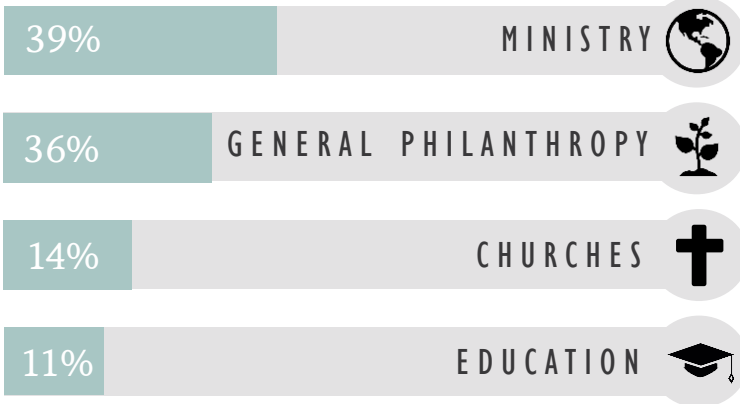
FAMILY LEGACY IN ACTION

AN EBOOK ON STORIES OF IMPACT

BUILDING THE KINGDOM

GRANTS FACILITATED THROUGH WATERSTONE

WATERSTONE FY 2017 GRANTS (BY DOLLAR AMOUNT):



DID YOU KNOW?

Over 60% of all grants through WaterStone are directed to Christian organizations.

IN 2016, GIVERS RECOMMENDED \$46M IN TOTAL GRANTS THROUGH WATERSTONE TO OVER 1,953 NONPROFIT ORGANIZATIONS, LOCALLY AND AROUND THE WORLD.



STORIES OF IMPACT

GIFT OF REAL ESTATE FUNDS MISSIONARIES

A missionary mother developed a homeschool curriculum while in the mission field of Siberia. Out of that curriculum grew one of the largest Christian homeschool companies in the world, My Father's World.

The family now directs 50% of their profits to Kingdom work. They gifted the company's headquarters and distribution center to WaterStone and lease back the buildings. With the lease payments totaling over \$100,000 per year, grants flow directly to the work of missions.



FARMING COUPLE'S GIFT OF GRAIN SUPPLIES MINISTRIES

A generous couple had a desire to use the resources that God blessed them with, yellow corn and soybeans, to fund ministries. Through WaterStone's innovative solutions, the grain elevator was able to transfer the asset into WaterStone's name and in return, WaterStone was able to sell the bushels of yellow corn and soybeans, gifting the proceeds to a Giving Fund the couple had set up in advance.

The giver saved 45% in taxes by using WaterStone's charitable solutions and expertise, and the couple was able to fulfill their desire to donate to a number of ministries including; church building campaigns, Focus on the Family, Campus Crusade, projects in Haiti, Navigators, and Samaritan's Purse.



STORIES OF IMPACT



GIFT OF BUSINESS TO HELP WOMEN



A father-son business used WaterStone to transfer majority ownership from dad to son. Dad gifted shares of the company to a WaterStone charitable account, avoiding capital gains taxes and received a charitable deduction. The son then purchased the shares from WaterStone, becoming majority owner, and got a stepped-up basis. Because WaterStone financed the purchase, the son now pays back the note annually to his WaterStone Giving Fund and those cash injections fuel Kingdom giving to the tune of about \$2M per year.

With this money, the family founded and runs a crisis pregnancy center as well as supports missions work in the 10/40 window.

OIL WEALTH TRANSFORMED INTO CHRISTIAN ACADEMY

A family established a Family Legacy Fund (WaterStone Supporting Organization) and funded it with a partnership interest in their oil business.

WaterStone joined with the family on the Family Legacy Fund's board of directors. The fund purchased an abandoned golf course property and is converting it into a working farm for Rivertree Academy, a private Christian school for under-resourced children in Fort Worth. Right now, Rivertree serves 75 students Pre-K – 5th grade in the Como neighborhood with plans to build another school in the future.



WHAT CHARITIES SAY ABOUT WATERSTONE

“WaterStone is helping Save the Storks connect with major donors and provide them with fresh ideas about giving.”



“Thanks for being the conduit and for providing the tools to make it possible for people to give more than they ever thought was possible!”

**Faith Comes
By Hearing**

“WaterStone played an integral role in the purchase of Rivertree Academy’s campus, raising up a new generation of Christ-led young men from the Como neighborhood of Fort Worth.”



RIVERTREE ACADEMY



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

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