



HOW WATERSTONE SERVES

SERVING GIVERS AT THE INTERSECTION OF FAITH AND FINANCE

WATERSTONE

DESIGNING

INNOVATIVE GIVING SOLUTIONS

MULTIPLYING

THE IMPACT OF GIVING

MINIMIZING

TAXES

HEIGHTENING

THE JOY OF GENEROSITY



GIVE



ADVANTAGES

IDENTIFY FUNDING OPTIONS

Cash, securities, real estate, business interests, oil & gas or agricultural commodities

UTILIZE APPRECIATED ASSETS FOR GIVING

Capital gains taxes are optional

IMMEDIATE TAX DEDUCTION

When you give through appreciated assets you receive an immediate income tax deduction based on the fair market value of the asset.

ORGANIZE YOUR GIVING AROUND A PURPOSE

Create a purpose for your giving vehicle to ensure grants are given to causes you care about



GROW



ADVANTAGES

INVESTMENT OF ASSETS

Watch your Giving Fund grow through investment management of the assets

CHOOSE A POOL

Choose an investment pool that matches your investment philosophy

RECOMMEND AN ADVISOR

For qualified accounts, recommend your personal advisor to manage the Giving Fund

IMPACT INVESTMENTS

Consider adding Alternative and Impact Investments



GRANT



ADVANTAGES

RECOMMEND GRANTS ON YOUR TIMELINE

Grants can be requested online 24/7 or by phone

NO ANNUAL DISTRIBUTION REQUIREMENTS OR DEADLINES

SINGLE SOURCE FOR ALL TRANSACTIONS

GIVE ANONYMOUSLY

To retain full privacy, if desired



EMPOWER INTENTIONAL GIVING

THROUGH INTELLIGENT GIVING



BECOME TAX-SAVVY.

Givers and their advisors can count on WaterStone for cutting-edge tax-advantaged giving strategies.



TREAT GIVING LIKE A BUSINESS.

WaterStone helps givers by applying standard business practices like planning, counsel, due diligence and accountability.



TAP INTO COMPLEX ASSETS.

By gifting out of non-cash assets, givers can multiply their giving impact, minimize taxes, and heighten the joy of generosity.



GET SMART.

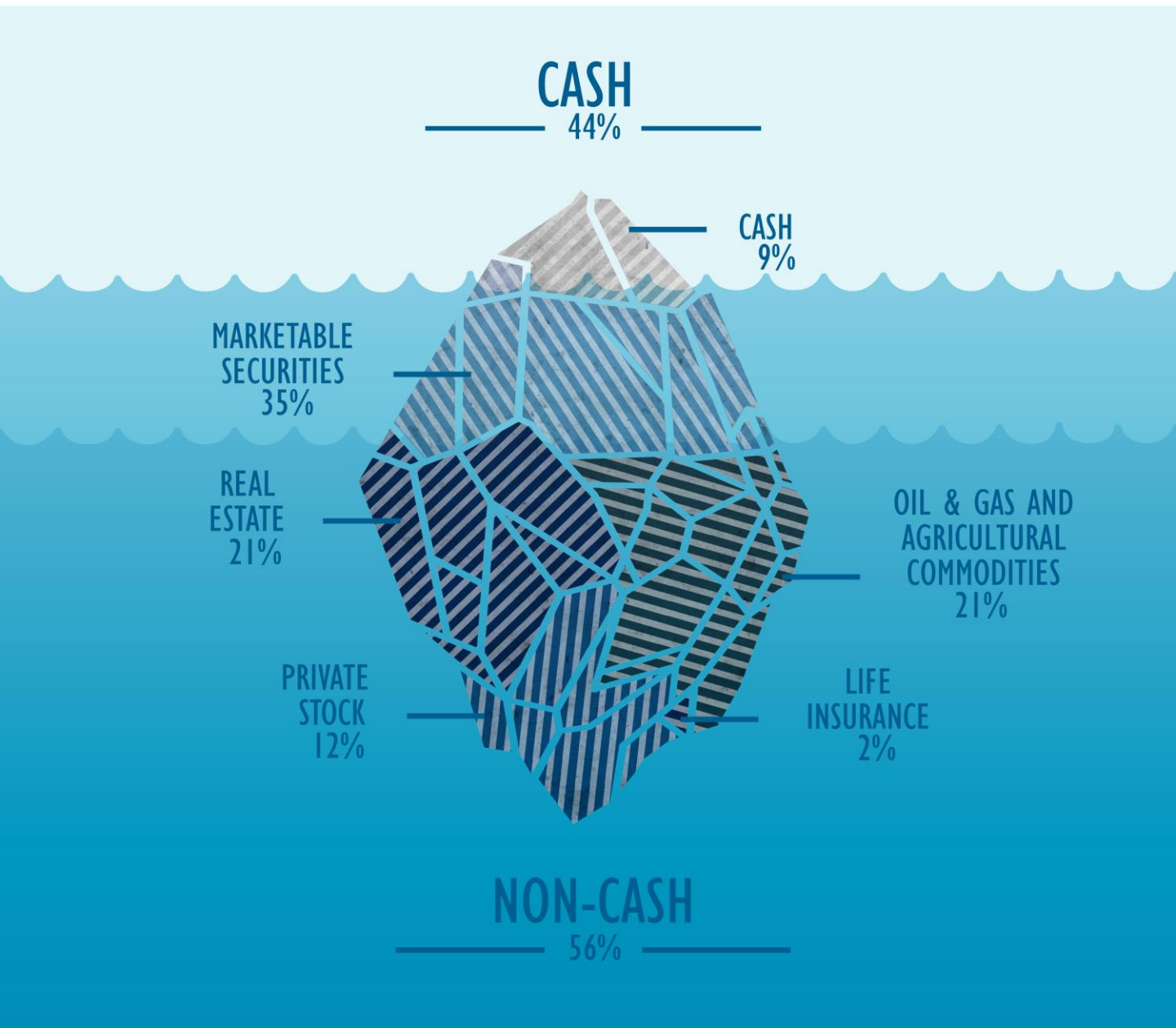
By incorporating WaterStone's expertise in innovative giving solutions, givers enjoy significant economic benefits and can share more with their preferred charities.



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.



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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