

GIVING SOLUTIONS

WaterStone's Guide to Giving

At WaterStone, we understand that executing your vision for giving with efficiency and effectiveness requires intentionality. WaterStone offers a variety of customizable giving solutions to help you accomplish your charitable giving goals. From simple donations of cash or stock to more complex gifts of real estate or agriculture, WaterStone is prepared to assist you in determining your best giving strategy.

We know that all gifts are unique. Our valuable Guide to Giving chart provides insight to which gifts can be given to what funds, ensuring every donation is fully optimized. Being connected with the right type of giving solution provides you with the maximum charitable deduction and your favorite charities with donations they can depend on.

GIFT TYPE	GIVING FUND	CHARITABLE REMAINDER TRUST	CHARITABLE POOLED TRUST
Cash Donations	✓	✓	✓
Marketable Securities	✓	✓	✓
Agriculture	✓	✓	—
Real Estate	✓	✓	—
C-Corp/LLC/LP*	✓	✓	—
S-Corp	✓	—	—
Oil & Gas	✓	✓	—
GIFT BENEFITS			
Immediate Tax Deduction	✓	✓	✓
Minimize Capital Gains	✓	✓	✓
Lifetime Income	—	✓	✓
Giving Optimization	✓	✓	✓

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