

CHARITABLE POOLED TRUST

A WaterStone Giving Strategy

Prioritize Income • Minimize Taxes • Optimize Giving

Increase your income while bypassing capital gains taxes and receiving an immediate charitable tax deduction. After all of the income payments have been distributed for the lives of the donors, the principal is distributed to your preferred charities.

GIVE



Choose cash or securities to gift to the Charitable Pooled Trust.



Receive a historically high immediate tax deduction today for the value that charity will receive in the future.



GROW



CPT investments will generate lifetime income to meet your objectives.

Designate income beneficiaries and receive a lifetime income stream from the trust.



GRANT



Remainder passes to Giving Fund.

Giving Fund will grant the funds to your preferred charity based on your selected distribution type:

- Immediate
- Term of Years
- Perpetual/Endowment

Update preferred charities with a simple call/email; no change to original trust documents.

*10% will pass to WaterStone's Kingdom Advancement Fund.

KEY BENEFITS:

Lifetime variable income with historically high tax deductions and a charitable impact.

Generate a
LIFETIME
income stream

Earn an
immediate
TAX
DEDUCTION
based on a
historically low
discount rate

Choice of
INVESTMENT
pools to meet
your risk/return
profile

When trust ends
REMAINDER
passed to
your preferred
charities

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