

CHARITABLE REMAINDER 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 completed, the remainder is distributed to your preferred charities.

GIVE



Give cash, securities, real estate, or other appreciated assets.



Receive an immediate tax deduction today for the value that charity will receive in the future.



GROW



WaterStone accepts the cash and/or sells the asset and invests the cash proceeds in a Charitable Remainder Trust.

Designate income beneficiaries and receive a lifetime or fixed-term 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.

KEY BENEFITS:

Generate an
INCOME

stream: lifetime or
fixed-term
(up to 20 years)

Earn an immediate

TAX

DEDUCTION

calculated on the
future remainder gift
to charity

WaterStone serves as

TRUSTEE

working with your
advisor, overseeing
beneficiaries and
back-end tax
reporting

When trust ends,

REMAINDER

passes to your
preferred charities

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