



ADVANTAGES OF
Endowment





Endowment

Endowment is unique due to its permanence and ability to multiply your gift many times over, far exceeding the gift's initial value. It is a giving pathway for individuals with a strategic vision for the future — donors who want their gift to not only impact this generation, but also generations to come.

For churches and ministries, endowed gifts build long-term financial stability

while simultaneously meeting short-term needs. An endowment works by investing your gift. Each year, a percentage of the endowment's value is distributed to the ministry you support while the remainder is allowed to grow to meet future needs. This cycle of distribution and growth creates a perpetual stream of income, providing ministries with financial stability that lasts a lifetime and beyond.

HOW IT WORKS



“I’ve been a tither since I was 16. When I give to an endowment through WatersEdge, I know that the income will continue to help the ministry I’ve chosen to support from now until Jesus returns. Endowment is a way for me to leave a legacy beyond myself so that when I’m dead and gone, I’m still giving a tithe. That’s very fulfilling to me.”

Wayne C. | Oklahoma City, OK

Key Benefits

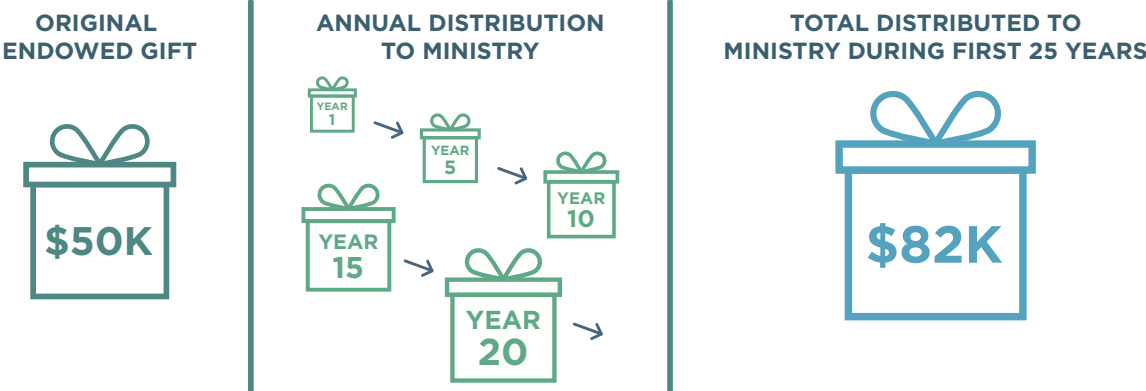
- 1 Leave A Legacy**
Endowment is a permanent, perpetual gift, which means it will continue to support ministry for generations, long after your passing.
- 2 Multiply Your Gift**
An endowment is invested for growth. Annual distributions to ministry increase over time, multiplying your gift and maximizing impact.

- 3 Give Over Time**
You can give to your endowment during your lifetime and after death, through your estate plan. Others can contribute, too.

GIVING EXAMPLE

Imagine placing \$50,000 into an endowment for a ministry that’s close to your heart. In its first year, your endowed gift would distribute about \$2,250. While that amount may seem small compared to the size of the initial gift, time quickly multiplies the impact. Over 25 years, your \$50,000 endowment could grow its annual distribution from \$2,250 to \$4,570. Cumulative distributions over that 25-year period would total \$82,000, more than \$30,000 above the original \$50,000 gift.

Net of fees. Assumes 7.5% growth and 4.5% annual distribution.



GET STARTED AT:
WatersEdgeServices.org/Endowment

Endowment Form

To open an endowment account, please complete and return the following form to WatersEdge by email, fax, or mail.

Email: give@WatersEdgeServices.org
Fax: 405-948-7862
Mail: WatersEdge
3800 N. May Ave.
Oklahoma City, OK 73112

DONOR CONTACT INFORMATION

Donor Name(s): _____

Mailing Address: _____ City: _____ State: _____ Zip: _____

Home Phone: _____ Cell Phone: _____

Email: _____

Preferred Contact Method: Email Phone Letter

CHARITABLE BENEFICIARY DETAILS

Please describe the beneficiary or beneficiaries of the endowment below. The total for the beneficiary percentages when added together must equal 100%. Please note that endowments with multiple beneficiaries will be administered in multiple accounts. Beneficiaries must be qualified 501(c)(3) charitable organizations and qualify as Gift Recipients under the WatersEdge Gift Acceptance Policy. If there are restrictions or designations, please describe in detail below.

Beneficiary Organization Name	Beneficiary Percentage
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
TOTAL:	_____ %

ENDOWMENT DETAILS

Please describe how the donor(s) would prefer the Endowment to be titled. Examples include “The Smith Family Endowment”, “The John 3:16 Mission Fund”, “The John Smith Memorial Endowment”, “[Insert Church Name] Endowment Fund”, “The Smith Family Scholarship Fund”, etc. If this gift is made in honor or in memory of a loved one, please describe here as well.

Account Name: _____

In Honor of: _____

In Memory of: _____

GIFT DETAILS

WatersEdge will issue a receipt and provide a letter confirming the gift format and contribution value for tax purposes and donor records.

Approximate Initial Funding Amount: _____

ASSET & TAX INFORMATION

Asset descriptions assist WatersEdge in accurately preparing the donor’s tax receipt.

Cash or Cash Equivalent Other Asset: _____

If the gift is not being made in cash, please complete the following:

Cost Basis: _____ Approximate Present Value: _____

Gifted Asset Has Been Held (*check one*): More than 1 year Less than 1 year

Security’s Name, if Applicable: _____ Number of Shares: _____

Filing Method: Donor(s) plans to itemize deductions
(*check one*) Donor(s) plans to take the standard deduction

Annual Income Estimate: _____

ACKNOWLEDGEMENT

With the permission of the donor(s), gifts for the benefit of the recipient charitable beneficiaries are accompanied by a letter which includes the name(s) of the donor(s) in order that the recipient charitable beneficiaries may thank the donor(s) for the gift. Please check only one box to designate how gifts should be acknowledged.

- Please identify this gift as ANONYMOUS to the Beneficiary Charities
- Please share the donor's name(s) with the Beneficiary Charities

FEE

Endowments are assessed the WatersEdge administration fee. Currently, the administration fee is 1.05% annually. On a monthly basis, $\frac{1}{12}^{\text{th}}$ of this administration fee is charged to the balance of the account.

SIGNATURE

Please sign and date below to confirm that this document reflects the donor's intentions.

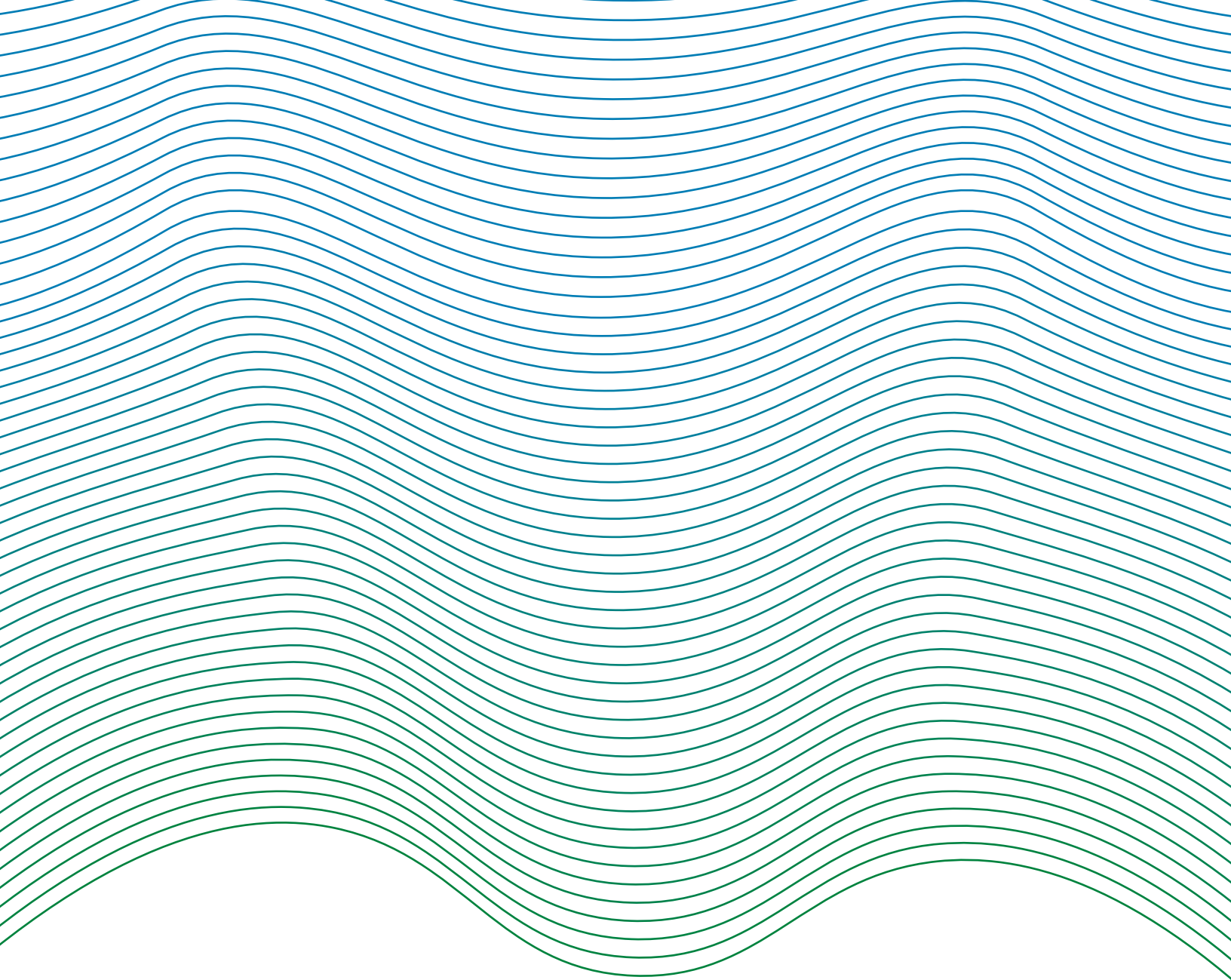
Donor Name(s)

Date

NOTES



A series of horizontal lines for writing notes, consisting of 25 evenly spaced lines that fill the majority of the page.



3800 N. May Ave. | 800-949-9988
Oklahoma City, OK 73112 | WatersEdgeServices.org