



Endowment

FOR CHURCHES & MINISTRIES





Endowment

Endowment is unique due to its permanence and ability to multiply your contribution many times over, far exceeding the contribution's initial value. It is a giving pathway for ministries with a strategic vision for the future and for 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 the funds. Each year, a percentage of the endowment's value is distributed to your ministry 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



“With the help of WatersEdge, First Baptist Church of Ardmore established our Legacy Fund several years ago. It is a wonderful place for memorial gifts and other offerings that will bless the church until Jesus comes. It has already grown to almost one million dollars. It is great to know I can give to my church forever.”

Dr. Alton Fannin | Ardmore, OK

KEY BENEFITS

1 Establish Your Future

Endowment is a permanent, perpetual gift, which means it will continue to support your ministry for generations.

2 Continue Adding Funds

Additional contributions can be made into the endowment account at any time in the future, further increasing your distributions.

3 Receive Larger Distributions Every Year

An endowment is invested and grows tax-free. Annual distributions to ministry increase over time, multiplying your contribution and your impact.

4 Allow Donors To Make A Lasting Impact

Anyone who shares the vision of your ministry can contribute to your endowment, supporting you until Jesus returns.

GIVING EXAMPLE

Imagine placing \$50,000 into an endowment. In its first year, your ministry would receive a check for about \$2,250. While that amount may seem small compared to the size of the initial funding amount, 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:
WatersEdge.com/endowment

Endowment Form

FOR CHURCHES & MINISTRIES

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

Email: give@WatersEdge.com
Fax: 405-948-7862
Mail: WatersEdge
300 Johnny Bench Dr., Suite 200
Oklahoma City, OK 73104

Contact Information

Ministry Name: _____

Pastor or Executive Director Name: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Preferred Contact Method: Email Phone Letter

Endowment Purpose(s)

Please describe how you plan to use the distributions from your endowment (budget support, capital improvements, specific ministry project, location, etc.).

Endowment Designation (Purpose)	Designation Percentage
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
TOTAL:	_____ %

Successor Beneficiary

In the event your ministry ceases operations, please designate another ministry to benefit from the endowment (i.e. IMB, Falls Creek, Association, or name of a similar ministry to yours).

Successor Beneficiary: _____

Endowment Details

Please describe how the endowment is to be titled. Examples include “[Insert Church or Ministry Name] Endowment Fund”, “The John 3:16 Mission Fund”, “The John Smith Memorial Endowment”, “The Smith Family Scholarship Fund”, etc.

Account Name: _____

Fee

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

How Did You Hear About Us?

Tell us how you heard about WatersEdge (choose all that apply):

- Professional Advisor
- Pastor
- Church
- Presentation
- Web/Marketing
- Ministry
- Staff
- Other

Please list specific name(s) and/or organization(s): _____

Signatures

By signing below, the undersigned person(s) state they have the authority to sign on behalf of the ministry and have received all necessary approvals as required by the ministry's governing documents.

Ministry Name: _____

Authorized Signer 1

Print Name: _____ Title: _____

Address: _____ City, State Zip: _____

Phone: _____ Email: _____

Signature: _____ Date: _____

Authorized Signer 2 (if necessary)

Print Name: _____ Title: _____

Address: _____ City, State Zip: _____

Phone: _____ Email: _____

Signature: _____ Date: _____

Authorized Signer 3 (if necessary)

Print Name: _____ Title: _____

Address: _____ City, State Zip: _____

Phone: _____ Email: _____

Signature: _____ Date: _____

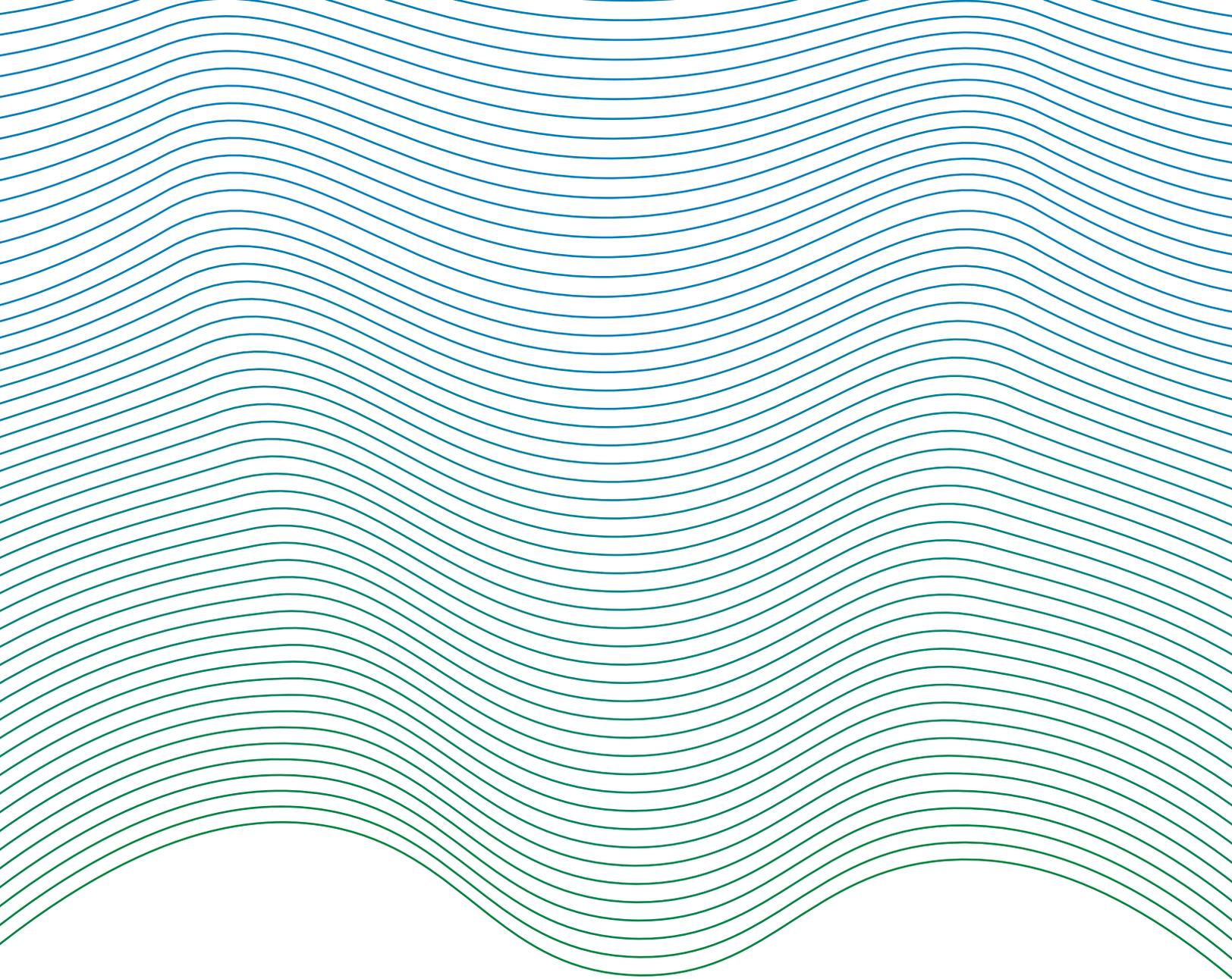
Authorized Signer 4 (if necessary)

Print Name: _____ Title: _____

Address: _____ City, State Zip: _____

Phone: _____ Email: _____

Signature: _____ Date: _____



300 Johnny Bench Dr., Suite 200 | 800-949-9988
Oklahoma City, OK 73104 | WatersEdge.com