



CHARITY ADVISED FUND

APPLICATION

Part I CHARITY INFORMATION

To retain data, please save this file to your computer before sending as an e-mail or printing.

NAME OF CHARITY <i>(print)</i> _____	TIN # _____
FUND ADVISOR _____ <i>(Primary contact)</i>	TITLE _____
ADDRESS _____	
CITY _____	STATE _____ ZIP _____
TELEPHONE _____	FAX _____
EMAIL _____	WEBSITE _____

Part II NAME OF FUND

The _____ Fund <i>(Charity name)</i>

Part III PURPOSE

To support the mission of _____ as described in Attachment A.
(Charity name-must be a 501 (c)(3) organization.)

Check One

Annual distributions in perpetuity of _____% (up to 5%)

Distributions are recommended by the Advisory Board

Please Attach: Attachment A - Mission Statement

Part IV ADVISORY BOARD (Optional)

NAME	POSITION

STATEMENT OF UNDERSTANDING

WHEREAS, WaterStone (“Organization”) is organized exclusively for charitable, religious, and educational purposes, including the aid and support of other organizations who are qualified for exemption from Federal income tax under the Internal Revenue Code as now in effect or as subsequently amended, that are organized and operated for Christian charitable, religious, and educational purposes, primarily in, or for the benefit of, the Christian community.

WHEREAS, _____ (“Charity”), a 501 (C) (3) publicly supported charity, desires to offer the opportunity to their supporters to make gifts of real estate and other hard to value assets, and gifts of split interest, to be used for the benefit of the Christian community;

WHEREAS, a Charity Advised Fund has been established at the Organization for the benefit of the Charity to hold contributions of such gifts of real estate and other hard to value assets, and gifts of split interest; and,

WHEREAS, the Board of Directors of the Organization has directed that the Charity Advised Fund established for the benefit of the Charity shall be held exclusively for the purposes of the Charity so long as the Charity maintains its 501 (c) (3) exemption and the purposes of Charity are acceptable to the Organization. We agree that this document and any others relating to this application, whether original, faxed, or electronic, will be deemed original.

IT IS UNDERSTOOD, that, upon the request of the giver, the Organization will receive and receipt donations into the Charity Advised Fund established for the benefit of the Charity. The Organization will assist the Charity and its supporters in completion of such gifts into the Charity Advised Fund established for the benefit of the Charity. Additionally, upon the request of the giver, the Organization will assist the giver in establishing charitable gift annuities, charitable trusts, and/or Giving Funds.

FURTHER, the Giving Advisor designated by the Charity may select an advisory committee to provide him/her with investment and distribution advice relating to the Charity Advised Fund.

FURTHER, the Charity acknowledges the receipt of the current fee schedule and understands that fees will apply once the account is active. The Organization reserves the right to change the fee structure at any time, but will maintain the lowest fee schedule possible consistent with the ability to provide quality service.

FURTHER, all marketing and fund raising materials developed by the Charity relating to the services of the Organization must be reviewed by the Organization prior to printing or general distribution.

This STATEMENT OF UNDERSTANDING is executed by the Organization and Charity this ____ day of _____, 201__.

WATERSTONE

Name of Officer (please print name)

Signature Date

APPLICANT/GIVING FUND ADVISOR:

Name of Charity Officer* (please print name)

Signature Date
*Charity officer, please sign above and a copy will be returned to you.

PROFESSIONAL ADVISOR

I hereby certify that I have informed the applicant of the nature of Charity Advised Funds.

Name of Professional Advisor

Signature Date

Name of Firm

Telephone

Address

City State Zip

Email Address



Statement of Purpose

VISION

Every Christian a faith-filled intentional giver.

MISSION

Honoring God. Serving Givers. Building the Kingdom.

VALUES

Christ-centered: • Service • Integrity • Love

STATEMENT OF FAITH

1. *We believe that the entire Bible is the inspired and inerrant Word of God; the only infallible rule of faith and practice.*
2. *We believe that there is one God, eternally existing in three persons; Father, Son and Holy Spirit.*
3. *We believe that Jesus Christ is the only begotten Son of God, conceived by the Holy Spirit, born of the Virgin Mary, and was true Man and is true God.*
4. *We believe that in this age, God manifests Himself through the Holy Spirit who is a distinct personality, eternally co-existent with the Father and the Son, whose basic task is to convict sinners, regenerate those who believe, and empower believers to live godly lives and in every way glorify the Father and the Son through His indwelling presence.*
5. *We believe that man was created in the image of God, that he sinned and thereby incurred not only physical death, but also spiritual death which was eternal separation from God and is upon all men.*
6. *We believe that the Lord Jesus Christ died for our sins according to the Scriptures, as a representative and substitutionary sacrifice, and that all who believe in Him are justified on the basis of His shed blood.*
7. *We believe that the Lord Jesus Christ was resurrected in body, ascended into Heaven, presently lives there for us as High Priest and Advocate, and that His personal, physical return to earth is imminent.*
8. *We believe that there will be a bodily resurrection of both the just and the unjust, the just to the everlasting blessedness of the saved and the unjust to the everlasting conscious suffering of the lost.*

This Statement of Faith is a part of the incorporating documents of Christian Community Foundation, now doing business as WaterStone. Because the Board of Directors acknowledges that Christians have historically understood that the claims of Christ compel them to undertake a broad range of charitable and educational endeavors as well as direct Christian ministry, it is our passion to implement all recommended charitable giving as long as it is not contrary to this Statement of Faith, current policies of this organization, or current guidelines of the Internal Revenue Service.

ELIGIBLE GRANT RECIPIENTS

WaterStone seeks to encourage givers undertaking a broad range of charitable and educational endeavors as well as direct Christian ministries. Our passion is to implement all recommended charitable giving not contrary to our Statement of Faith, current policies, or current guidelines of the Internal Revenue Service.

WaterStone however will not authorize distribution of charitable funds to advance activities that the Board of Directors deems to be inappropriate, in conflict with the Statement of Faith, or contrary to this organization's purposes, even though such purposes may be legitimate for tax-deductible donations.

The Internal Revenue Code specifically disallows charitable distributions which might:

- Provide private benefit to the giver or a related individual;
- Pay dues or membership fees;
- Purchase tickets to a charitable event or benefit, such as banquets, golf tournaments, auctions, or sponsorships;
- Pay a pledge made by a giver to another charitable organization;
- Pay for school tuition – except within the context of an established scholarship program;
- Support charities on the terror-watch list; or
- Support a political party or candidate for election.

WaterStone retains the ultimate right to determine approval or disapproval for distribution.

WaterStone

Charitable Solicitation Disclosures

(Christian Community Foundation, Inc. dba WaterStone)

STATE	DISCLOSURES
FLORIDA	A copy of the official registration and financial information may be obtained from the Division of Consumer Services by calling toll-free within the state 1-800-HELP-FLA. Registration does not imply endorsement. Florida registration # CH8609.
GEORGIA	Description of programs and financial statement are available upon request. Christian Community Foundation, 10807 New Allegiance Drive, Suite 240, Colorado Springs, CO 80921.
IOWA	Information is available upon request, Christian Community Foundation, 10807 New Allegiance Drive, Suite 240, Colorado Springs, CO 80921.
KANSAS	Information is available upon request, Christian Community Foundation, 2925 Professional Pl., Ste. 201, Colorado Springs, CO 80921, reg # 2846815.
MARYLAND	Documents and information filed under the Maryland charitable organizations laws can be obtained from the secretary of state for the cost of postage and copies.
MICHIGAN	Registration # MICS 22126.
MISSISSIPPI	The official registration and financial information of the organization may be obtained from the Mississippi Secretary of State's office by calling 1-888-236-6167. Registration by the Secretary of State does not imply endorsement by the Secretary of State.
NEW JERSEY	Information filed with the attorney general concerning this charitable solicitation may be obtained from the attorney general of the state of New Jersey by calling 201-504-6215. Registration with the attorney general does not imply endorsement.
NEW YORK	A copy of the latest annual report may be obtained from the organization or from the Charities Bureau, Department of Law, 120 Broadway, New York, NY 10271.
NORTH CAROLINA	Financial information about this organization and a copy of its license are available from the State Solicitation Licensing Branch at 1-888-830-4989. The license is not an endorsement by the state.
OHIO	Information available from Christian Community Foundation, 10807 New Allegiance Drive, Suite 240, Colorado Springs, CO 80921.
PENNSYLVANIA	The official registration and financial information of Christian Community Foundation may be obtained from the Pennsylvania Department of State by calling toll free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.
VIRGINIA	Financial statements are available from the Office of Consumer Affairs.
WASHINGTON	Christian Community Foundation, registration # 889, registered with the office of the secretary of state, 1-800-332-4483.
WEST VIRGINIA	West Virginia residents may obtain a summary of the registration and financial documents from the Secretary of State, State Capitol, Charleston, WV 25305. Registration does not imply endorsement.

ATTACHMENT A
CHARITY MISSION STATEMENT
Please state organization purpose or mission.