

Thu, Sep 17, 2020

Creative estate planning can benefit you, your family, and Bethel.

Create a Legacy

ESTATE PLANNING NEWS

Hi –

As we've welcomed students back to campus this month, we're aware that our world needs a Christ-centered education more than ever during times of challenges and hardships.

In this month's newsletter, we want to share how Bethel students, faculty, alumni, and friends responded to tragedy by serving future Bethel students. A year ago, a tragic car accident took the life of Anthony Nelson '20, a standout student, athlete, and business major who loved life and people. Generous business-connected donors came together to raise \$25,485 to form the [Anthony Nelson Memorial Scholarship](#), an endowed scholarship that benefits future accounting and finance students.



In times of hardship, the Bethel community remains strong. As our world faces continued challenges, Bethel remains committed to providing students and employees with a safe, vibrant, Christ-centered community in which to learn and grow this fall. As we safely welcome students back to campus, we are ready to discuss ways you can give to Bethel and create a legacy to benefit many generations to come. If you would like to learn more about a living trust or any other giving opportunities, [please contact me](#).

Dan Wiersum

Associate Vice President for Planned Giving

Why give to Bethel's Endowment?



An endowment financially sustains the [mission](#) and work of Bethel University. We established our endowment so Bethel can continue to be a Christ-centered institution, anchored on a biblically-based foundation, that strives to educate and energize men and women with excellence in leadership, scholarship, and service. Our endowment will help us carry on this important work for years to come.

Endowed Scholarships or Program Endowments

Many alumni and friends of Bethel support students and the university through endowed scholarships—either through gifts or [bequests](#) in a will or trust.

- **Endowed Scholarships:** By creating a named endowed scholarship, your gift remains intact as principal in the endowment. Once this principal reaches \$10,000, Bethel will then award annually a portion of the earnings to students as specified by the donor.
- **Estate Gift Scholarships:** As part of your estate—through your will, trust or other gift vehicle—specify a gift for student scholarships. This is an ideal way to add to an existing endowed scholarship, or fund a new

endowed scholarship in honor or memory of a loved one, or to support a Bethel program you are passionate about.

Rather than scholarships, some prefer to generate a program endowment to support a specific academic area or program.

Other Ways to Make Endowment Gifts:

Beneficiary Designations

Some of the most common assets that pass to us through **beneficiary designations** are:

- Checking, savings and/or mutual fund accounts
- Retirement accounts such as an IRA, 401(k) or 403(b)
- Life insurance policies
- Commercial annuities

Charitable Life Estates

Do you own a home, vacation property or farm? With a charitable life estate, you can make your gift to us today and continue to use and enjoy the property during your lifetime. This gift is as simple as deeding your property to us with a provision in the deed that permits your continued use. You are also entitled to tax benefits and the property is removed from your estate.

Charitable Life Income Plans

Charitable life income plans such as a **charitable gift annuity** and **charitable remainder unitrust** enable you to make a future gift to endow our work while protecting or enhancing your current financial security.

Find out how you can join hundreds of Bethel supporters to our endowment through legacy gifts to help current and future students afford a Christ-centered Bethel education. For specific questions, please call [Dan Wiersum](mailto:Dan.Wiersum@bethel.edu) or the Planned Giving office at [651.635.8053](tel:651.635.8053), or planned-giving@bethel.edu

Endowed Scholarship Honors Memory of Anthony Nelson '20



Anthony Nelson (center)

A year ago, a tragic car accident took the life of Anthony Nelson '20, a standout student, athlete, and business major who loved life and people. Now, through the generosity of business-connected donors—including an international accounting firm and Bethel business faculty and alumni—his life continues to impact future students through the Anthony Nelson Memorial Scholarship.

[Read more about how his memory will live on and helps others to have a great Bethel experience like he did.](#)

Estate Planning Resources

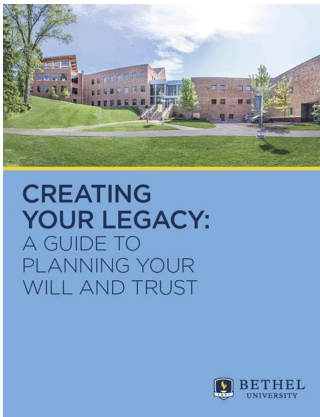
Creating A Will is Easier Than You Think

Creating your will is your opportunity to carefully articulate your wishes, your values, and your legacy. This planning is important to help you *Provide* for and *Protect* your loved ones and the charitable organizations you care about after you're gone.

If you are thinking about creating or updating a will or trust, we can help. Bethel's website at bethel.edu/planned-giving includes a number of valuable resources about [wills and bequests](#), including wills videos, and a free personal and secure [online Wills Planner Account](#).

SPECIAL OFFER—Get Your FREE Wills Guide Legacy Pack

We would like to send a [FREE Wills Guide](#), *Creating Your Legacy: A Guide to Planning Your Will and Trust*, to our friends and alumni. This guide is an easy-to-use, fill-in-the-blank booklet that can help you organize all of



the information an estate planning attorney will need to create your will or trust plan.

[Bethel's estate planning experts](#) are also available to answer questions and help customize your estate plans to **Provide** for and **Protect** you and your family while creating an enduring legacy.

Upcoming Events:

- [Ross Allen Inauguration Events](#) | October 2-3
- [Homecoming 2020](#) | October 2-3

Personal Planner

Married Couples and Property

Mary was a surviving spouse. She and her first spouse, Ryan owned a lovely home and placed it into joint tenancy with right of survivorship. After Ryan passed away, Mary met Logan and they were... [Learn More](#)

Finances

Stocks—[Read Latest News—](#)

Stocks

Bonds—[Read Latest News—](#)

Bonds

CDs and Mortgages—[Read](#)

[Latest News—Interest](#)

Savvy Living

What is a Reverse Mortgage?

What can you tell me about reverse mortgages? The damage to my retirement account from the coronavirus has me considering it but want to make sure I know what I am getting into. Massive job losses, a... [Learn More](#)

Washington News

[Read Latest News—Washington](#)

Bethel's Planned Giving Team



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This material is for educational purposes only and is not intended as financial, legal, or tax advice. Please seek a professional advisor for personal estate planning services.