
Planned Giving Newsletter - February 2022

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



ESTATE PLANNING NEWS

Called to More—Create a Legacy

Hi –

Spring semester is underway at Bethel, and before long our senior class of Bethel students will graduate and go on to change the world in countless ways. Every donor to Bethel is part of this impact. The prayers and support of friends like you make a Bethel education possible for our students and leave a lasting legacy of faithfulness.



Doris (Swanson) Johnson '66 is one example of this faithfulness: someone who lives “an ongoing lifestyle that involves active investment in others,” as she puts it. Doris and her husband Dennis '63, who passed away in 2019, have made their primary financial contributions to Bethel through charitable gift annuities, establishing scholarships for chemistry, music, and students who would otherwise be financially unable to attend Bethel.

Read more about the legacy of Doris and Dennis in this newsletter, and find resources that can help you creatively plan a legacy of investment in others as well. Like the Johnsons, you'll find that generous giving pays forward, benefiting students now and in the future as well as all those they impact.

If you have questions or would like to talk to a member of our team, please reach out. We'd love to hear from you!

Adel Irwin
Senior Director of University Advancement

Donor Story



Doris (Swanson)
Johnson

To Doris (Swanson) Johnson '66, “legacy” is not just a noun—it’s a lifestyle. She explains that she and her husband Dennis '63, who passed away in 2019, consider giving as an act of faith looking forward. They’ve made their primary financial contributions to Bethel through charitable gift annuities. “The charitable gift annuity program is one of the best win-win options available,” says Doris. “Everyone benefits—the investors, the students, and Bethel.”

[Read the full story.](#)

Charitable Gift Annuities

You may be worried about relying on uncertain investments in the stock market for your retirement income. A charitable gift annuity with Bethel University provides you with a secure source of guaranteed fixed income for life.

WHAT IS A CHARITABLE GIFT ANNUITY?

A charitable gift annuity (CGA) is a contract between you and Bethel. With the gift of a CGA, you receive lifetime fixed payments and tax savings. After you have received all payments, what remains supports Bethel's mission of providing students a Christ-centered, transformative education.

How a Charitable Gift Annuity Works

- You transfer cash, publicly traded securities such as stock, or a life insurance policy with cash value to Bethel University.
- In exchange, we promise to pay fixed payments for life to you and/or a loved one. Payment amounts are based on the age of the annuitant—the older you are, the higher the rate and the more you will receive. And a portion of each payment may be tax-free.
- You will receive a charitable income tax deduction in the year the gift is given.
- If the annuity is funded with appreciated assets, you may realize capital gains tax savings.

Through a CGA, you are creating a legacy and supporting Christ-centered education. Please contact us with questions about other funding options or to begin the gifting process.

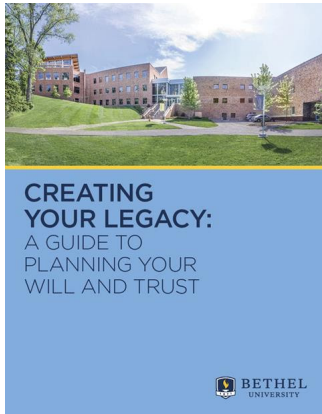
Estate Planning Resources

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](#).



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.

Planned Giving Event

Scholarship Celebration 2021-2022

By invitation only

Thursday, March 31, 2022

5:30-7:30 p.m.

The Underground

Bethel University

Come together for dinner, then join us, either in person or virtually, to celebrate how scholarships impact the lives of Bethel students. Donors will have the opportunity to share why their scholarship was created and their heart for Bethel's mission. Students will be able to share how their scholarships have impacted their education, what their hopes are for the future, and how Bethel has shaped them into world-changers.

Schedule of Events

5:30-6 p.m. | Check-in

6-7:30 p.m. | Dinner and Program

6:50 p.m. | Virtual Access

Please register by Thursday, March 24.

Personal Planner

'Give it Twice' Trust

A very popular option for a parent with children is called the "Give It Twice" trust. This is a trust funded when the surviving parent passes away. Part of the estate is transferred outright to children. The balance is placed in a special "Give It Twice" trust. [Learn More](#)

Savvy Living

How to Get Your Affairs in Order

Organizing important documents and getting your personal and financial affairs in order is a smart idea and wonderful gift to your loved ones. Here are some tips to help get you started. [Learn more](#)

Bethel's Planned Giving Team



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This information is educational in nature. It is not offering professional tax, legal, or accounting advice. For specific advice about the effect of any planning concept on your tax or financial situation or with your estate, please consult a qualified professional advisor.

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