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## “Creating a Legacy” Estate Planning eNewsletter – December 2017

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From: **Bethel University** <[planned-giving@bethel.edu](mailto:planned-giving@bethel.edu)>

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

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# *Create a Legacy*

## ESTATE PLANNING NEWS

Hi —

December is a special time of year for Christians. We reflect on the birth of Jesus during Advent and celebrate the great joy of His coming at Christmas. I pray you and your family experience the wonder of this priceless gift this Christmas season.

As the end of the year approaches, we'd be happy to talk with you about including Bethel in your charitable giving. Donor Advised Funds (DAF) are a good option, especially if you had a large income or sale of appreciated property this year. You can



read more about DAFs below and how Bethel Trustee Randy Dorn '77 and his wife, Gail, set up a Donor Advised Fund with Bethel.

Please [contact us](#) if you'd like to learn about other creative giving options as you finalize your end-of-year gifts. Our goal is to provide credible information about these important financial decisions for Bethel alumni and friends.

Merry Christmas to you and yours!

Dan Wiersum  
*Associate Vice President for Planned Giving*

## [ANTICIPATING NEW TAX LAWS](#)

### **Giving by December 31 May Maximize Your Deduction**

With talk of pending tax law changes, many people are looking for ways to maximize giving in 2017 should changes in the tax bill affect the benefits of charitable gifts. A December 6 CNBC article by Sarah O'Brien, "[Donors boosting charitable giving ahead of tax reform](#)," may shed light and offer suggestions as you come to the end of this tax year.

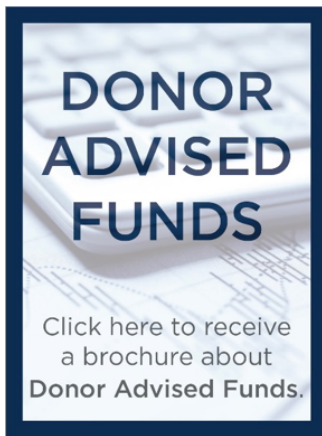
Please contact Mark Miles, senior vice president for advancement, at [651.635.8065](tel:651.635.8065) or [m-miles@bethel.edu](mailto:m-miles@bethel.edu) if you have questions or would like assistance with a year-end giving plan.

## **DONOR ADVISED FUNDS**

### **The Gift that Keeps on Giving**

A gift planning option to consider at year-end is a [Donor Advised Fund \(DAF\)](#), particularly if you have a large income or sale of appreciated property this year.

A DAF allows you to make a gift today that would enable you and your loved ones to continue to



make charitable gifts in the future. When you make a gift to Bethel University of cash or other assets, we take your tax-deductible contribution and establish a special account in your name. Your account is then invested to grow over time, permitting you to recommend annual gifts to your favorite charities.

Opening a DAF account is easy to do. Simply contact us for an application form, and complete and sign the fund agreement. You may fund your account with a gift of cash, securities, real estate, or other assets. Check with us if you have unique or special assets that may be donated in a tax-efficient way.

For specific questions about a DAF, please call [Dan Wiersum](#) or the Planned Giving office at [651.635.8053](tel:651.635.8053), or [planned-giving@bethel.edu](mailto:planned-giving@bethel.edu).

## Family Legacy Inspires Investment In Future Royals



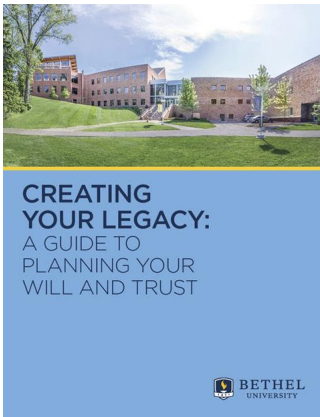
Bethel Trustee Randy Dorn '77 and his wife, Gail, built their own family from within the Bethel community. Now, they've made it their mission to support Bethel students in creative ways, such as setting up a Donor Advised Fund (DAF).

[Read more about their Bethel story.](#)

**Randy & Gail Dorn**

## Planned Giving Resources

We are offering a [FREE Wills Guide](#), *Creating Your Legacy: A Guide to Planning Your Will and Trust*, to our friends and alumni. This guide walks you through the information gathering steps as you begin to think through your will, estate, and passing assets to family members.



## Personal Planner

### Living Trust Verses Wills

There are a number of reasons why a person frequently starts the estate planning process with a will.

However, for those individuals who can afford a living trust, it is a very good choice. [Read More](#)

### Savvy Living

#### When Will Medicaid Pay for Nursing Home Care?

What are the eligibility requirements to get Medicaid coverage for my mother's nursing home care? [Read More](#)

### Bethel's Planned Giving Team



## Washington News

[Read Latest News—Washington](#)

## Finances

**Stocks**—[Read Latest News—Stocks](#)

**Bonds**—[Read Latest News—Bonds](#)

**CDs and Mortgages**—[Read Latest News—Interest](#)

**Dan Wiersum '73,**  
**CSPG**  
*Associate Vice President  
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**Marleen Smith**  
*Manager for Planned  
Giving Operations*

NEWS

EVENTS

GIVE

**[Office of Planned Giving](#)**

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[bethel.edu/planned-giving](http://bethel.edu/planned-giving)

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