
“Creating a Legacy” Estate Planning eNewsletter – January 2018

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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 –

Happy New Year! As a new year begins and we set various financial goals for ourselves, I'd like to tell you more about [Charitable Gift Annuities \(CGA\)](#). A CGA is when you make a gift of cash or property to Bethel, and in return, Bethel makes payments for life to you, you and a loved one, or another person. Each payment is fixed, and the amount depends on the age of the person receiving the payments. Bethel does CGAs for individuals age 55 and older, and your gift annuity payout rate is based on your age. After you have



received all of your payments, what remains goes to Bethel, creating an enduring legacy that directly benefits students. If you'd like to learn more, [contact us](#) today.

If you'd like to discuss other creative giving options, please [contact us](#). Our goal is to provide credible information about these important financial decisions for Bethel alumni and friends.

Dan Wiersum
Associate Vice President for Planned Giving

MAKE A LASTING IMPACT

With a Charitable Gift Annuity

A gift planning option to consider is a [Charitable Gift Annuity \(CGA\)](#)

The returned benefits of a charitable gift annuity include:

- Lifetime payments for you (and/or spouse)
- An income tax deduction the year the gift is given
- Capital gains tax savings when funded with appreciated assets
- The satisfaction of contributing to an enduring legacy at Bethel
- The knowledge that your gift has a lasting impact in the lives of Bethel students

For specific questions or for a free illustration about a CGA, please call [Dan Wiersum](#) or the Planned Giving office at [651.635.8053](#), or planned-giving@bethel.edu.

Charitable Gift Annuities Are a Win-Win for Bethel Donors Like Charles and Janice Rehman

Take it from retired pastor and Bethel donor Chuck Rehman—"You don't have to be a millionaire to give." After selling their cabin, Charles "Chuck" '53, S'60 and Janice Rehman took out a Charitable Gift Annuity with Bethel. "The

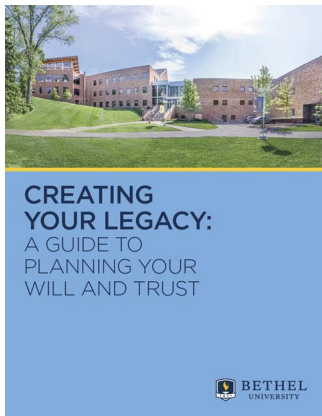


**Chuck & Janice
Rehman**

Charitable Gift Annuity is a positive thing because you're giving toward an endowment fund, but you're getting some return on it, too," Rehman says. "It's something I wouldn't hesitate to promote."

[Read more](#) about the Rehmans and why giving to Bethel is important to them.

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

How to Fund Your Living Trust

A revocable living trust is one of the principal estate planning methods. While everyone should have a will, there are many benefits of a revocable living trust. [Read More](#)

Finances

Stocks—[Read Latest News](#)—

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[Bonds](#)

Savvy Living

Recognizing and Treating Depression in Retirement?

Since retiring a few years ago, my husband has become increasingly irritable and apathetic. I'm concerned that he may be depressed, even though he may not realize it. Where can we turn to get help with this and what, if anything, does Medicare pay for? [Read More](#)

Washington News

[Read Latest News](#)—[Washington](#)

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

Bethel's Planned Giving Team



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