



"Creating a Legacy" June 2019 —What Legacy Will You Leave?

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

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Hi –

Last month we hosted our annual Royal Heritage Society dinner. The Royal Heritage Society honors donors who have named Bethel University in their estate plans, wills, trusts, insurance, retirement assets, and life income agreements. I often refer to this group as our legacy donors. Through their giving, they have elevated Bethel to the level of a family member and for that we are truly honored. The level of generosity from our Royal Heritage Society donors overwhelms me often.



You can read more about the Royal Heritage Society and the event we held in May in this month's newsletter. Also, we have included information about giving opportunities through charitable bequests.

If you would like to talk more about planned giving options to Bethel, please [contact me](#) and I would be happy to discuss plans that fit you and your family.

Dan Wiersum

Associate Vice President for Planned Giving

Impact Future Generations with a Charitable Bequest



A bequest is a way to have a lasting impact on the people and organizations that mean the most to you.

A [charitable bequest](#)—a gift made through your will—is one of the easiest gifts to make. With the help of an advisor, you can include language in your will or trust specifying a gift to be made to family, friends, or charity as part of your estate plan. A bequest may be made in several ways:

- A dollar amount
- A percentage of your estate
- A specific asset
- The residual of your estate

Benefits of a Charitable Bequest

One benefit of a charitable bequest is that it enables you to impact Bethel students long after you're gone. In addition, a charitable bequest can help you save estate taxes by providing your estate with a charitable deduction for the value of the gift. With careful planning, your family can also avoid paying income taxes on the assets they receive from your estate.

Additional Bequest Options

Certain types of property are designated outside a will or trust, such as an IRA or an insurance policy. These assets require you to name a beneficiary by completing a beneficiary designation form. To bequest these assets, contact the company or entity from which you purchased the asset.

Bethel's estate planning experts are also available to answer questions and help you with sample bequest language to include in your will. For specific questions, please call [Dan Wiersum](tel:651.635.8053) or the Planned Giving office at [651.635.8053](tel:651.635.8053), or planned-giving@bethel.edu.

The Impact of Estate Gifts at Bethel



For years, alumni and friends of Bethel have been electing to designate part of their estates to the university upon their death. From scholarships to building campaigns, the impact is widespread.

“One theme we see is that when people decided to make these estate gifts, they often have no idea what the impact might be,” says Dan Wiersum, associate vice president for planned giving.

Brushaber Commons, the biology and chemistry labs, the Wellness Center, and Lissner Residence Hall are some of the larger projects on Bethel's campus that have been partially funded by estates left to Bethel through charitable bequests.

While the future is unknown, the historic impact of donors who have included Bethel in their will is evident. [Read highlights of estate gifts at Bethel.](#)

Join the Bethel Royal Heritage Society



When you include Bethel University in your estate plan, a gift through your will, trust, insurance, retirement assets, or life income agreement, you demonstrate the depth of your commitment to Bethel. You become a member of the [Royal Heritage Society](#), a distinguished group of investors whose combined commitments help to ensure a strong future for Bethel.

On behalf of the students, faculty, and staff of Bethel University, we invite you to become a member of our Royal Heritage Society. By including Bethel in your estate planning, you will make an enduring contribution to the mission and future of our Christ-centered institution.

To learn more about leaving a [bequest](#) to Bethel and becoming an RHS member, please call [Dan Wiersum](#) or contact the Planned Giving office at 651.635.8053 or planned-giving@bethel.edu.

Planned Giving Event

Royal Heritage Society Dinner Looks to the Future of Bethel Seminary

This past May, members of Bethel's [Royal Heritage Society](#)—some of the university's most faithful and longtime supporters—came together for dinner and enjoyed a spectacular concert by the Bethel University Department of Music to celebrate what God has accomplished through their gifts.

Attendees heard from student-athlete Cassidy Abbott '20, who shared her family's story of dealing with a difficult illness and the support she received from Bethel and her softball team. Dean of Bethel Seminary Peter Vogt spoke about how Bethel continues to reimagine seminary education.

"Bethel has undergone significant change in the past, but change is inevitable," Vogt said. "What motivates me is the opportunity amidst the change... because our commitment to Bethel's calling... that has not changed."

[Read more and view pictures from the Royal Heritage Society event.](#)

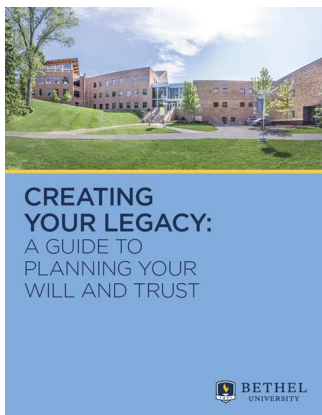
Estate Planning Resources

Creating A Will is Easier Than You Think

Creating your will is your opportunity to carefully articulate your wishes, values, and legacy. This planning is important to help you *Provide* for and *Protect* your loved ones, as well as charitable organizations, after you are gone.

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

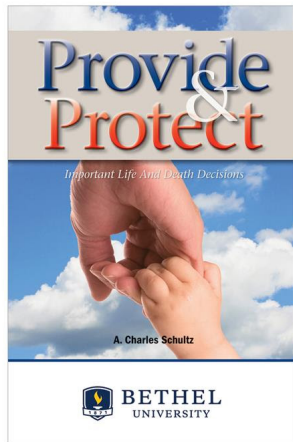
SPECIAL OFFER—Get Your FREE Wills Guide Legacy Pack



We would like to send you a **FREE Wills Guide Legacy Pack** with estate planning resources including:

- **Bethel Wills Guide – *Creating Your Legacy: A Guide to Planning Your Will and Trust***. 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 and trust plan.



- ***Provide & Protect: Important Life Decision*** by A. Charles Schultz. This multimedia book is packed with tips on how to help you create a secure and satisfying future.
- **25 Estate Documents You Need To Put In One Place**
- And more estate planning tips...

Request a pack today by going to [Free Wills Guide](#) and completing the request form. In the “**comments**” section, write: “**Wills Guide Legacy Pack.**”

Personal Planner

Important Life Decisions

"How can I plan?" asked Mary. "We just sold our home and bought a retirement condo. Our older child just moved across the country and our younger child will be getting married later this year. With so much change, how can we make plans?" [Read More](#)

Finances

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Savvy Living

Adaptive Gardening: Tips and Tools for Older Gardeners

Can you recommend some good tools and tips for senior gardeners? My 77-year-old mother loves to work in the garden but has been plagued by injuries over the past few years. Aches, pains and injuries... [Read 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.

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