



"Creating a Legacy" October 2019 — Year End Gifts of Stocks or other Appreciated Assets!

From: **Bethel University** <development@bethel.edu>

Date: Wed, Oct 23, 2019 at 4:35 PM

Subject: "Creating a Legacy" October 2019 — Year End Gifts of Stocks or other Appreciated Assets!

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

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Create a Legacy

ESTATE PLANNING NEWS

Hi –

October finds Bethel students halfway through the first semester of the 2019–20 academic year. As they prepare for mid-term exams, we like to share ways you can prepare for year-end. This newsletter will highlight the tax savings benefits of charitable gifts of [appreciated assets](#). A gift of securities, business interests, or real estate can provide you with a significant charitable deduction and potentially capital gains tax savings, often exceeding the benefits of a cash gift.



You'll also read about the impact donors like [Marilyn Starr](#), Bethel dean of women emerita, who served at Bethel from 1967 until her retirement in 1983. "Marilyn's legacy is part of the lasting fabric of Bethel," says Sande Traudt, associate professor of social work. A benevolent fund in memory

of Marilyn, provided through her estate, honors and perpetuates her legacy of caring for students. You can also learn how such support directly impacts students like Student Body President [Kennadie Anderson '20](#).

If you'd like to discuss giving a gift of stock or other creative ways you could realize extra year-end tax savings while supporting Bethel, please [contact me](#) in the planned giving office. I'd be happy to help.

Dan Wiersum

Associate Vice President for Planned Giving

Gifts of Stocks, Mutual Funds, or other Appreciated Assets

Are You Looking for Ways to Save on Taxes and End the Year Well?



As Bethel students prepare for mid-term reports and exams, you may already be planning your year-end charitable giving. With the stock markets setting new record highs, and the tax reform act of 2017, now may be a good time to consider giving [appreciated stocks and mutual funds](#) as part of your year-end strategy. Also, if you own shares of mutual funds that have appreciated in the past year, now is a good time to donate them to a charity such as Bethel.

[Gifts of appreciated assets](#), including real estate or business interests, are excellent ways to support Bethel's mission of transformative Christian higher education and theological training. These gifts can provide you with numerous benefits:

- Avoid capital gains taxes up to 23.8%
- Receive an income tax deduction, based typically on the asset's fair market value
- Make a meaningful gift now with no cash out-of-pocket
- Avoid the Affordable Care Act Medicare tax

Dividends and capital gains are distributed at year's end. Donating your mutual fund shares now, before taking those distributions, may reduce or eliminate altogether the taxes you would otherwise incur on those gains, and it will increase the value of your gift to Bethel.

[Here's how](#) to transfer shares of stocks or mutual funds from your brokerage account or to make gifts of stock certificates to Bethel. For more specific questions about gifts of appreciated assets to donate to Bethel, please call [Dan Wiersum](#) or the Planned Giving office at [651.635.8053](tel:651.635.8053), or planned-giving@bethel.edu.

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Marilyn Starr



Marilyn Starr

In her 16-year career as a dean in Bethel's student life office, Marilyn Starr offered support, encouragement, and care to hundreds of Bethel students. "Marilyn's passion was always the students," says her niece Nancy Starr.

Though Marilyn died in October 2018, she continues to care for students through a newly created benevolent fund in her memory, the Marilyn Starr Endowment for Student Care, funded by a charitable bequest to Bethel in her living trust. In keeping with her passion for supporting students, the fund will provide awards to College of Arts & Sciences students with emergency personal financial need, such as airfare home for a family emergency, at the discretion of Bethel's dean of student programs.

[Read more about Marilyn's legacy.](#)

Kennadie Anderson '20



Kennadie Anderson

Kennadie Anderson '20 of Mora, Minnesota is a biology major with a chemistry minor, but she is better known for being the face of the student population, coming into her second year as student body president.

"I think my experiences at Bethel have prepared me really well," Anderson says, in considering her future as a pharmacist. "I've gotten to experience things, but also having a relationship with people that I see as really good leaders, people that I see as great contributors to the Kingdom and the world. I think having exposure to people who really do show up for what they say they will is the most influential part of my leadership experience at Bethel."

[Read more about Kennadie's leadership experience at Bethel.](#)

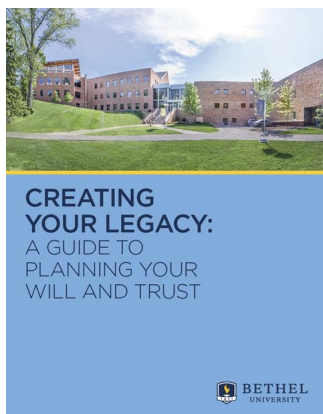
Estate Planning Resources

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 Fall 2019 Events

- [Scholarship Appreciation Dinner 2019–2020](#) | November 6
- [Royal Nation: Portland](#) | November 17
- [Royal Nation: Seattle](#) | November 18
- [Festival of Christmas](#) | December 5–7

Personal Planner

Social Security

Linda asked, "When should I take my Social Security? I will turn 57 this year and have a strong earnings history, having paid into Social Security for nearly 35 years. Given the year I was born, my... [Read More](#)

Finances

Stocks—[Read Latest News—](#)

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Bonds—[Read Latest News—](#)

Savvy Living

Electric Bikes Are Booming Among Baby Boomers

What can you tell me about electric bicycles? A friend of mine, who is almost 70, recently got one and absolutely loves it. He told me he rides more now than he ever did his regular bicycle.

Electric... [Read More](#)

Washington News

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Bethel's Planned Giving Team



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10/23/2019

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