

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

ESTATE PLANNING NEWS

Called to More—Create a Legacy

Hi –

In May we celebrate one of the most important milestones of Bethel's academic year—commencement! It's a cause for celebration for each graduate, for their families, and for the Bethel community who supported them along the way. That community includes donors like you, who through prayers and financial generosity make a Bethel education possible for our students.



Our newsletter this month includes the story of one donor who—inspired by the bequest to Bethel made by his parents—decided to create his own Bethel legacy by establishing a planned gift. Learn more about what motivated this father and son to support the education of future Christian leaders at Bethel, and find resources that can help you with your own estate planning as well.

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

Adel Irwin

Senior Director of University Advancement

Donor Story



Fred Berndt Jr. attended Bethel for just one year. But when he and his wife Sylvia did their estate planning, they decided to follow in the footsteps of Berndt's parents, Fred Berndt Sr. '52 and Retha (Creech) Berndt, who provided bequests to establish a scholarship fund for Bethel students who are planning to become teachers. Inspired by their example, Fred Jr. and Sylvia established a bequest for Bethel too. "I saw, as my father did, the importance of a liberal arts education," says Fred Jr. "I hope my bequest can, in a small way, further Bethel's calling and mission."

[Read the full story.](#)

Student Impact Story



Biokinetics major Marcus Krupke '22 has learned a lot over his last four years at Bethel. His worldview has expanded, his faith has grown, and the relationships he's developed have proven priceless as he prepares for a life greatly shaped by his Bethel experience.

[Read the full story.](#)

Leave An Enduring Impact

Many of us feel a compelling need to make a difference—to leave a lasting impact on the people and organizations that mean the most to us. A [bequest](#) is the easiest, most tangible, and flexible way to leave a legacy of enduring significance.

BENEFITS OF MAKING A BEQUEST

- You leave a lasting legacy.
- You can lessen the burden of taxes on your estate, resulting in a larger inheritance for your heirs.
- You can choose to designate that a bequest be used for a general or specific purpose, so you have peace of mind knowing that your gift will be used as intended.
- You can continue to use property you will leave to charity during your life.
- A bequest is generally a revocable gift, meaning it can be changed or modified at any time.

AN EASY GIFT TO MAKE

A [bequest](#) is one of the easiest ways to give. With the help of an adviser, you can include language in your will or trust specifying a gift be made to family, friends, or Bethel University as part of your estate plan. You can make a bequest in a number of ways:

Specific Bequest. Make a gift of a specific asset such as real estate, a car, other property, or a gift of a specific dollar amount.

Percentage Bequest. Leave a specific percentage of your overall estate to Bethel University.

Residual Bequest. Make a gift from the balance of an estate after the will or trust has given away each of the specific bequests. A common residual bequest involves leaving a percentage of the residue of the estate to charity.

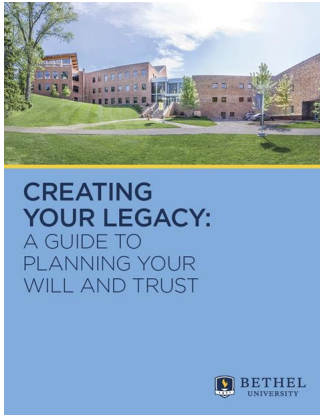
For more information, please call [Adel Irwin](#) or contact the Planned Giving office at 651.635.8053 or planned-giving@bethel.edu.

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.

Personal Planner

[Domicile - Where You Live Affects Your Taxes](#)

A successful business owner with a large estate passed away in 1976. He had grown up in Texas, moved to California and also lived for many years in Nevada. With a net estate of \$2.5 billion, his estate owed substantial federal and state taxes.

Savvy Living

[Specialized Moving Services That Help Seniors Downsize and Relocate](#)

The process of downsizing and moving to a new home is a big job for anyone, but it can be especially overwhelming for seniors who are moving from a long-time residence filled with decade's worth of belongings and a lifetime of memories. Fortunately, there is a specialized service available today that can help make your mom's move a lot easier.

Bethel's Planned Giving Team



Adel Irwin
*Senior Director of University
Advancement*



MaryKay Bursaw
*Manager of UA Planned Giving and
Scholarship Operations*

[Office of Planned Giving](#)

651.635.8053 (800.255.8706, ext. 8053)

planned-giving@bethel.edu

bethel.edu/planned-giving

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.