
"Creating a Legacy"-June 2018: Higher Gift Annuity Rates Benefit Bethel Friends

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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—

We have a lot to share with you in this month's edition of our Planned Giving newsletter. You will read about an exciting announcement regarding an increase in Charitable Gift Annuity rates, which takes effect on July 1, that could benefit you and your family.

You also will read information on how to make a memorial gift in honor of a loved one. Sam and Matt Lacy are brothers from Texas who recently started a scholarship in their mother's name. I encourage you to read their moving story and see how they were able to honor their mother while also benefiting future Bethel students.



Finally, I want to thank everyone who joined us for the Royal Heritage Society dinner last month. We enjoyed talking to many of you and having the opportunity to share a few stories about the impact the Bethel difference is having on Bethel students.

At Bethel University, we're committed to excellence. But here, excellence means something more. It means taking our faith in Christ and integrating it into everything we learn, into everything we do, so we can accomplish incredible things—in our careers, in our communities, and in our world.

Thank you for making the Bethel difference possible!

Dan Wiersum

Associate Vice President for Planned Giving

New Higher Gift Annuity Rates Effective July 1



The American Council on Gift Annuities announced recently that they have set higher [charitable gift annuity](#) rates, which will begin on July 1—good news for Bethel friends who want to support our work and provide income for themselves or others. This means at many ages, higher lifetime payments can be locked in when a gift is made. Based on an annuitant's age, you could see an increase between 30%–50%.

[Please contact Dan Wiersum](#) with questions or for an illustration at these new rates.

Brothers Establish Scholarship for First-Generation, Underprivileged Students



Scholarships made college possible for Sam and Matt Lacy, who grew up on welfare in west Texas. Now they have endowed a scholarship for first-generation college students who otherwise could not afford a Bethel education—just like them.

Sam & Matt Lacy

Read the Lacy brothers story and how their scholarship honors their mother while also helping the next generation of Bethel students. [Read the Story](#)

A Gift in Memory of the Ones You Love

Have you considered making a memorial gift in the future? There are many ways for you to make a gift in remembrance of someone special that will have meaningful significance for years to come, including using your will or living trust to make a gift in honor of a loved one. Your bequest may be made in the following ways:

- Make a gift of any cash amount
- Give a specific asset from your estate
- Make a gift of percentage of your estate
- Give from the residuum of your estate.

A Memorial Gift of Cash or Property

A gift of cash is one of the simplest ways to remember your loved one or friend. You receive a tax deduction for the value of your gift to us. Many chose to [create a scholarship](#) like Sam and Matt Lacy who established the Jo Lynn Lacy Scholarship to honor their mother. When you make your gift, please designate the person you wish to remember and the best way we can honor them.

Make a Deductible Gift and Receive Life Income

You may wish to make a memorial gift while providing current life income for yourself and family. If you are looking for ways to increase your income, you might consider a [memorial gift annuity](#) or a [charitable remainder trust](#). [Contact us](#) if you are interested in reviewing a gift annuity proposal or for more information on charitable trust plans.

Membership in the Royal Heritage Society

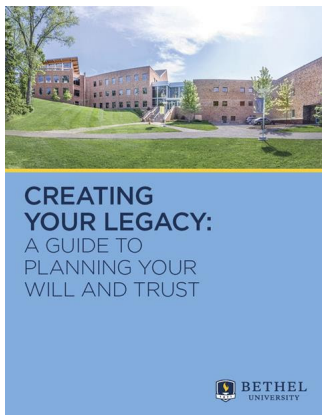
When you include Bethel University in your estate plan, a gift through your will, trust, insurance, retirements assets, or life income agreement, you demonstrate the depth of your commitment to Bethel. You also become a member of [The Royal Heritage Society \(RHS\)](#), a distinguished group of investors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

Gifts bestowed through the Royal Heritage Society support capital improvements, endowment growth, scholarships, academic programs, and a variety of other important services and programs.

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 be making an enduring contribution to the mission and future of this great academic institution.

To learn more about leaving an memorial or tribute gift that will [create a scholarship](#) and make a difference in a student's life, or to learn more about 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 Resources



Free Wills Guide—Benefit Your Family and Impact Bethel's Future

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.

Royal Heritage Society Donors Celebrate "The Bethel Difference"

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

Mikayla Holmgren '18 from the [Bethel University Inclusive Learning and Development \(BUILD\)](#) opened the program with prayer and Pamela Lebert '21, recipient of Bethel's full-tuition, full-need [ActSix](#) leadership scholarship, spoke about her Bethel experience.

During their prayer and address, both Mikayla and Pamela spoke of the immense difference Bethel and the Bethel community have made in their lives spiritually, academically, and financially. Both of these talented young women were able to attend Bethel because people like you who chose to fund scholarships at Bethel.

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

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." [Read More](#)

Finances

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

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

Savvy Living

How to Find Retiree Travel Perks

What types of travel discounts are available to older travelers? I just retired and am interested in learning about travel deals for people over 60. [Read More](#)

Washington News

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