
“Creating a Legacy” Estate Planning eNewsletter – April 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 –

A frequently asked question in my line of work is, “What’s the easiest way for me to make a planned gift to Bethel?” My answer is always: name Bethel in your will. A gift made through your will, often called a charitable bequest, is one of the easiest gifts to make. Consult your attorney about including language in your will or trust to benefit Bethel along with your family and friends.



Below you’ll see a story about Steve and Kelley Bergeson who have given to Bethel in many ways through the years. More recently, they made the decision

to include Bethel in their will so their gifts can continue to benefit Bethel students for years to come.

At the beginning of the month, we held our annual Scholarship Recognition Dinner. It is a wonderful evening and every year I enjoy watching our donors have the opportunity to meet the students who are directly benefiting from their scholarship gifts.

[Contact us](#) today to find out how you, too, can include Bethel in your will and benefit future generations of Bethel students.

Dan Wiersum
Associate Vice President for Planned Giving

What Legacy will you Leave?



We all desire significance—to lead joyful and fulfilled lives surrounded by family and friends.

Many of us have a compelling need to make a difference—to leave a lasting impact on our loved ones and the world in which we live. The desire to live faithful and meaningful lives leads many people to ponder what their legacy will be. *What kind of legacy will you leave?*

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

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

The Real Legacy



**Steve & Kelley
Bergeson**

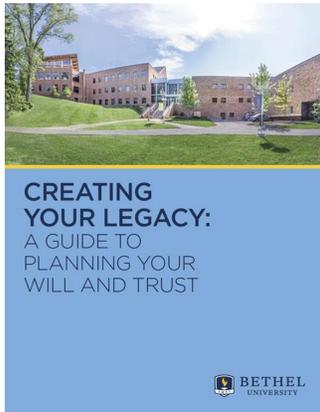
Serving is very important to Steve Bergeson '76. He and his wife, Kelley, have served in healing professions for many years—Steve as a physician at Allina Health's clinic in Shoreview, Minnesota, since 1983, and Kelley as a chaplain at Lyngblomsten Care Center in St. Paul.

Now the Bergesons have found another way to serve Bethel students for generations to come. They've updated their wills to reflect their passion for preparing students to serve God in their chosen vocations, just as the Bergesons have done in their own work lives. "Our hope is that our funds will serve to train disciples who will go into the world and use their vocation to glorify God—even worship Him—in their work," says Steve. "The world is searching for truth and is often hostile to the gospel, so vocation is a mechanism

by which some who would never attend church will encounter God.”

[Read more](#) about the Bergesons and what they consider to be the real legacy for Christ-followers.

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.

2018 Scholarship Recognition Dinner

The annual Scholarship Recognition Dinner was held earlier this month.

This joyful event offers an opportunity to formally thank and recognize the investment donors have made in Bethel students. The dinner also provides an opportunity for students whose lives have been transformed at Bethel to meet the donors who made their education possible through scholarship gifts. Many heard firsthand how the Lord is using their generosity to change students’ lives and leave a lasting legacy.

[Read more about the evening and view pictures from the Scholarship Recognition Dinner.](#)

Personal Planner

How to Receive Cash for Your Life Insurance Policy

I have a life insurance policy that I have been making payments on for years. I really do not need the policy

Savvy Living

Putting Together Your Will—A Few Considerations

Though it may seem hard to believe, at age 65, I have never gotten around to making a will, but I'd like

anymore and I have been thinking about letting it lapse, but recently heard that I can sell it for a lump sum. What can you tell me about this? [Read More](#)

to now. My question is: Do I need to hire a lawyer to write my will, or can I draft it myself? I want to get my affairs in order, but I'd hate to pay an... [Read More](#)

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