
“Creating a Legacy” Estate Planning eNewsletter – February 2018

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

Date: Thu, Feb 15, 2018 at 3:00 PM

Subject: “Creating a Legacy” Estate Planning eNewsletter – February 2018

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

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Create a Legacy

ESTATE PLANNING NEWS

Hi –

As February began at Bethel, so did our spring semester—although the weather doesn’t quite feel like spring yet in Minnesota! Wherever you are, I hope you’re enjoying the last few weeks of winter.

In Bethel’s Planned Giving office, we’re diving into the new tax bill that passed at the end of 2017 to better understand the included changes for charitable giving. Some of the changes in particular will benefit charitable giving among high-income givers who choose to itemize their



deductions. If you'd like to learn more about the 2017 Tax Cuts and Jobs Act and how it will effect Charitable Gift Annuities (CGA), we've included an article below that will give you more information.

As always, we invite you to [contact us](#) to discuss creative giving options to Bethel. Our goal with this monthly email is to provide credible information about these important financial decisions for Bethel alumni and friends.

Dan Wiersum
Associate Vice President for Planned Giving

2017 Tax Cuts and Jobs Act (TCJA) & Charitable Gift Annuities (CGA)



Your Gifts Make A Difference

And giving can still benefit you, your family, and Bethel

The 2017 Tax Cuts and Jobs Act, enacted on December 22, 2017, is the most sweeping update to the U.S. tax code in more than 30 years. The income tax changes include:

- Lower individual tax rates
- Double the standard deduction
- Unchanged Capital Gains tax rates
- Increased Alternative Minimum Tax (AMT) exemptions
- Reduced Medical Expenses deductibility floor
- Increased deduction limit for cash gifts

Please see the [Tax Cuts and Jobs Act](#) in our Article of the Month section to learn more.

While tax laws have changed, there are still many ways you can make a gift to support Bethel and make a difference in the lives of our students for years to come. A [charitable gift annuity](#) is a great way to earn tax benefits while benefiting others. The returned benefits of a charitable gift annuity include:

- Lifetime payments for you (and/or spouse)
- An income tax deduction the year the gift is given
- Capital gains tax savings when funded with appreciated assets
- Contributing to an enduring legacy at Bethel University
- Making a lasting impact in the lives of Bethel students

For specific questions or for a free personalized illustration about the benefits of a CGA, please call [Dan Wiersum](#) or the Planned Giving office at [651.635.8053](tel:651.635.8053) or planned-giving@bethel.edu.

The Impact of a Bethel Education Lasts a Lifetime



Mark Orgel

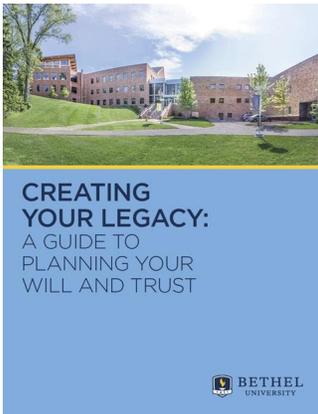
“A charitable gift to Bethel is different in terms of its impact on people. ...Bethel educates people to be ambassadors for Christ and to be successful in their careers. There are very few places that can impact that many people for the kingdom,” says Mark Orgel '83, owner of the investment firm Orgel Wealth Management.

[Read more](#) about how Orgel has used his investment knowledge to serve on the Board of Governors for the Bethel Foundation and why he and his wife Tammy choose to give regularly to Bethel.

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.

Bethel's Estate Planning Seminar



[Smart Ways to Provide for your Grandchildren](#)

When, what, and how to leave a living legacy through gifts to grandchildren and great-grandchildren

This is the fourth in a series of Estate Planning Seminars led by Bethel experts. This seminar will take an in-depth look at several gift plans that can provide income to your grandchildren for tuition and other expenses, offer tax benefits, and support your favorite charitable organizations. We will focus on how various planned giving vehicles may help provide solutions to common estate planning issues and consider the implications of the new Tax Cuts and Jobs Act that was implemented in December 2017.

Date: Tuesday, April 10, 2018

Time: 2–3:30 p.m. CT

Location: Bethel University

Anderson Center, Twin Cities Room (ANC 304)

2 Pine Tree Drive, Arden Hills, MN [55112](#)

This event and materials provided are free, but please **register by Tuesday, April 5** so we can plan accordingly.

Questions? Contact Marleen Smith at 651.635.8053 or planned-giving@bethel.edu

Register Today!

Personal Planner

"Wait A While" Trust

Bill and Clara were talking to their attorney Susan about their family. [Read More](#)

Finances

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

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

Savvy Living

How to Make Your Kitchen Safer and Easier to Use

What can you recommend that will make a kitchen safer and easier to use? My wife, who loves to cook, has had several kitchen-related accidents over the past year. We would like to modify the space to make it safer and more practical. [Read More](#)

Washington News

[Read Latest News](#)—[Washington](#)

Bethel's Planned Giving Team



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for Planned Giving*



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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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