
“Creating a Legacy” Estate Planning eNewsletter—March 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 –

I would like to introduce you to a new member of our team—Chuck Stroud. While Chuck may be new to planned giving, he has been at Bethel since 2001, previously working as the Bethel University Foundation controller and most recently as the university’s assistant chief financial officer. Before Bethel, Chuck worked for Ernst & Young and later for Moody Bible Institute. Much of his time at Moody was assisting the advancement staff with current tax planning for donors, as well as tax compliance for trusts and estates—making



Chuck Stroud

him the perfect candidate to help Bethel's planned giving team.

In addition to being a Bethel employee, Chuck has also been a student—completing our MBA program in 2007—and a Bethel parent when his daughters, Ashley '11 and Emily '14, attended Bethel. His wife, Jill, also works at Bethel in the human resources office.

Chuck and I are both available to assist you with creating an estate plan that meets your financial and charitable goals. If you have questions or would like to talk more about creative giving options to Bethel, I encourage you to give Chuck or me a call. We are here to help you.

Dan Wiersum

Associate Vice President for Planned Giving

CGA-funded Scholarship Allows Transfer Student to Experience the Bethel Difference

When Katie Murphy '19 began college, she attended a private Christian college across the country. But she quickly discovered that the academic experience wasn't meeting her expectations.

Bethel wasn't initially at the top of Katie's list when she thought of transferring schools. "But when I visited home, I'd come to Bethel to see [my friends], and it forced me to just walk around and talk to people and see the school," she says.

During one of those visits, Katie heard President Jay Barnes speak on the compassion of Jesus and the Christian faith. Then she learned that she could apply for a vocal scholarship—funded in part by [charitable gift annuities](#) given to Bethel—and she was swayed.



Katie Murphy

Now well-challenged and thriving as an organizational communications major at Bethel, Katie sings in the Bethel Women's Choir, attends Chapel regularly, served as a teacher's assistant for the communication studies department,

worked with Facilities Management, and uses Bethel's connections to get involved outside of the classroom.



A [charitable gift annuity](#) is a great way to earn tax benefits while benefiting Bethel students like Katie. 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

Read more about [Katie's Bethel experience](#) here.

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

Charitable Gift Annuity Helps the Music Stay Alive at Bethel



Mary & Warren Fall

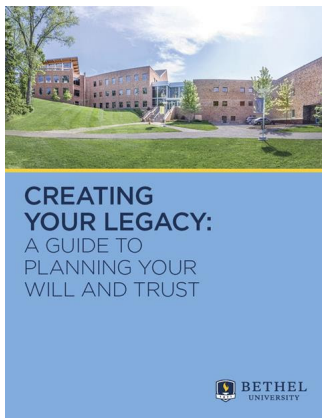
Professor of Music Emeritus Mary Fall once traveled the world with Bethel's ensembles. Today, through a charitable gift annuity (CGA), she and her husband, Warren, ensure future musicians will have similar opportunities.

"Bethel helped me put my [daughters] through college—I want nothing more than to give back," Mary says. "This is a good way for us to do that. It's a personal choice—but I know our support couldn't go to a better place."

[Read more](#) about how a CGA has been a wise investment for the Falls and a wonderful gift for

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, [Room 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 planned-giving@bethel.edu or 651.635.8053.

Register Today!

Personal Planner

Life Insurance—Costs and Benefits

Let's look at the "top five" reasons people give for not owning life insurance. [Read More](#)

Finances

Stocks—[Read Latest News—Stocks](#)

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

Savvy Living

Income Tax Filing Requirements for Retirees

What are the IRS income tax filing requirements for seniors this year? I didn't file a tax return the past two years because my income was below the filing requirements, but I started working part-time late last year, so I am wondering if I am required to... [Read More](#)

Washington News

[Read Latest News—Washington](#)

Bethel's Planned Giving Team



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CSPG, MBA**
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for Planned Giving*

**Chuck Stroud G'07,
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*Senior Planned Giving
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