

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

## ESTATE PLANNING NEWS

*Called to More—Create a Legacy*

Hi –

It's an exciting time of year at Bethel. The holiday season is upon us, and campus will soon be beautifully decorated with trees, ornaments, and lights. Festival of Christmas is around the corner, and our students are preparing to end the semester strong before heading home for Christmas break.



You're likely preparing for the holiday season and end of year, too. In this newsletter, you'll find resources that may be helpful to you as you consider year-end gifts. I also invite you to read the story of Becky Wahlund, a long-time supporter of Bethel Athletics, whose gift of stock helped make historic upgrades to Royal Stadium possible. Her gift will impact Bethel students for years to come.

We're so grateful for partners like Becky, and like yourself, who believe in the power of a Bethel experience. It's because of your generosity that we're able to continue preparing graduates to renew minds, transform culture, and advance the gospel.

In the midst of the busyness of this season, will you consider including Bethel in your year-end gifts? If you have questions or would like to talk about your options, please reach out! Our team would be happy to connect with you.

Adel Irwin  
Senior Director of University Advancement

Featured Product

### **Gifts of Stocks and Bonds**

Donating appreciated securities, including stocks or bonds, is an easy and tax-effective way for you to make a difference in the lives of Bethel University students. Your gifts can support scholarships, fund facilities enhancements, promote student research, and more.

#### **Benefits of [Gifts of Stocks and Bonds](#)**

- You'll avoid paying capital gains tax on the sale of appreciated stock.
- You'll receive a charitable income tax deduction.
- You'll help further Bethel University's mission of providing Christ-centered education.

There are special rules for valuing a gift of stock. The value of a charitable gift of stock is determined by taking the mean between the high and low

stock price on the date of the gift. Mutual fund shares are valued using the closing price for the fund on the date of the gift.

Gifts of stocks and bonds can be done electronically or by certified mail. Please contact our office for details.

## Jaran Roste



Jaran Roste

When Jaran Roste '21, GS'24 transferred to Bethel in 2018, he had no idea how his life would change over the next few years. The Bethel Royals starting quarterback has grown both on and off the field through his relationships with teammates, coaches, and students in Bethel's BUILD program. "I wouldn't have gained the experiences I had here at Bethel anywhere else," he says. "So much of that is because of generous donors, giving back to the Bethel community and students to allow us to go to school for less than the sticker price."

[Read the full story](#)

## Becky Wahlund



Kyle & Becky Wahlund

In 1980, Becky Wahlund received a wedding gift that now has a new life at Royal Stadium. Becky's story just goes to show the power of regifting. "Forty-one years ago, my late husband's grandparents gave us some stock," Becky recalls. Over the years, she reinvested the dividends again and again. In 2019, she decided the time had come to put this long-ago gift to good use for God's kingdom. So, she gave the stock to Bethel.

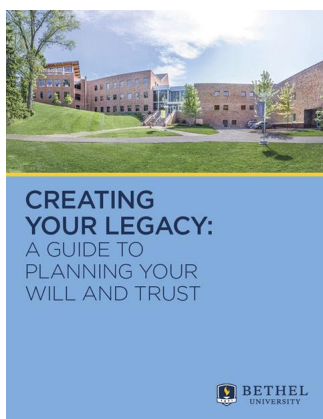
[Read the full story](#)

## 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](https://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

#### [Wills - Good and Bad](#)

More than 40 wills were submitted to the probate court, with a multitude of potential heirs each claiming to be the true recipients of the estate of Business Owner who passed away in 1976. With a \$2.5 billion estate at stake, there was intense interest in the decision of the court... [Learn More](#)

### Savvy Living

#### [Prevent Falls at Home](#)

Falls are a big concern for many elderly seniors and their families. Each

year, one in three older Americans fall, making it the leading cause of both fatal and nonfatal injuries for those age 65 and older. Many falls can be prevented. Depending on what is causing your mom to fall, here are some different tips that can help protect her... [Learn more](#)

## 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](mailto:planned-giving@bethel.edu)

[bethel.edu/planned-giving](http://bethel.edu/planned-giving)

Copyright © 2021 Crescendo Interactive, Inc.

Used by permission.

*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.*