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## “Creating a Legacy” Estate Planning eNewsletter – July 2017

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From: **Bethel University** <[development@bethel.edu](mailto:development@bethel.edu)>  
Date: Tue, Jul 18, 2017 at 4:30 PM  
Subject: “Creating a Legacy” Estate Planning eNewsletter – July 2017

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

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# *Create a Legacy*

## ESTATE PLANNING NEWS

Hi –

### Greetings from Bethel!

Summer vacations often provide opportunities to reconnect with family and friends and reflect on the important things in life, including one’s legacy. In this month’s newsletter, we’ll discuss the topics of wills and bequests. Thinking about death isn’t easy, but I’m grateful that as Christians we’re assured of eternal life with our Lord and savior in heaven. We know we can’t take our treasures with us, and we want to make sure we provide for those we leave behind.



At Bethel, our goal is to offer credible, up-to-date information about these important financial decisions for Bethel alumni and friends. Our desire is that these stories and resources will offer insight that can positively affect your quality of life, your finances, and your legacy.

We're also pleased to share with you the latest financial news from Washington, timely articles, and other resources to help you with your estate planning decisions.

Please [contact us](#) for more information or if we can otherwise be of assistance to you.

Dan Wiersum

*Associate Vice President for Planned Giving*



*Rae Lindgren*

## Wills/Bequests

### **Creating Your Legacy with a Charitable Bequest**

A Way to Give and Have a Lasting Impact for Bethel Students

Rae Lindgren provided generously for Bethel students for 20 years before her death in 2016. The estate gift she set up through her IRA will benefit students for decades to come.

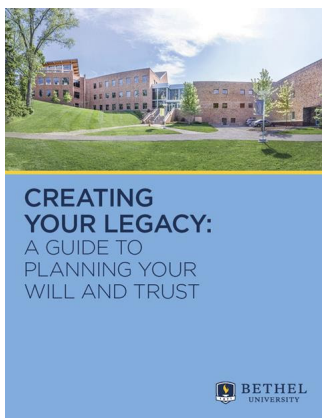
Through proper planning, you can put together a plan that takes care of your family and creates a legacy that demonstrates the values you hold dear. A will is a document that you create to direct the management and distribution of your property and provide for the care of your minor children after your death. It allows you to pass on your values by making a gift to your favorite charity.

Many friends of Bethel University, like Rae, have chosen to leave a gift through their estate to benefit Bethel's programs and students. Leaving a gift through your will or as a beneficiary of your

IRA is an easy way to do this. Some benefits of making these types of gifts:

- It costs you nothing today
  - A bequest is free of federal and estate tax
  - Your bequest can be changed later
  - An IRA bequest is simple, often only requiring a form from your IRA custodian
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- 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.

To learn more about the [benefits of a charitable bequest](#) for your family while making a lasting legacy for Bethel students for years to come, please [contact us](#) today.



REAP WHAT YOU SOW:  
Donor's Investment Comes Full Circle



Adrienne A. Aguirre

During her time working at Bethel Seminary San Diego, Adrienne Aguirre S'03 received an opportunity to get to know donor Rae Lindgren, whose gifts to Bethel had provided scholarship money to many students like Adrienne. Now a chaplain and writer, Adrienne shares how she was able to spend time with Rae before she passed away in 2016 and reflects on what it was like to be with her when she met Jesus.

[Read more about the impact Rae had on Adrienne's life through legacy gifts to Bethel.](#)

## Personal Planner

### Seven Questions on Gifts to Children

Many questions arise when we consider the options for giving to children. Why should we give? When, what, and how should we give? Will gifts impact the self-esteem and initiative of the child? Can a gift plan transfer values to children? [Read More](#)

## Washington News

[Read Latest News - Washington](#)

## Savvy Living

### Social Security Advice for Soon-To-Be Retirees

*Can you recommend any services that help pre-retirees decide when to start drawing their Social Security benefits? My wife and I are approaching retirement age and want to carefully weigh our options to make sure we're maximizing our benefits. [Read More](#)*

## Finances

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

**Bonds**—[Read Latest News – Bonds](#)

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

[Bethel's Planned Giving Team](#)



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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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