



"Creating a Legacy" July 2019—Create Your Legacy with an Endowment Gift

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

Date: Thu, Jul 18, 2019 at 4:01 PM

Subject: "Creating a Legacy" July 2019—Create Your Legacy with an Endowment Gift

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

No Images? [Click here](#)



Create a Legacy

ESTATE PLANNING NEWS

Hi –

Summer often brings lots of construction projects to Bethel and this summer is no exception. From [renovations on Nelson Residence Hall](#) to creating more academic space for [Bethel's growing engineering programs](#), there is a lot of activity on campus even with our students away.



Many students take advantage of internships during the summer months to gain work experience. Too often students must decide between gaining experience and making money during the summer, but donors Gene and

Kathleen Johnson have stepped in to help Bethel journalism students. Through the Johnson Center for Journalism and Communication, journalism students can receive Bethel funding for their summer internship opportunities. Read more about the Johnsons and students who have benefited from their giving in this month's newsletter.

If you have a creative giving idea that could benefit Bethel students, [please contact me](#). We can discuss ways you can give to Bethel and create a legacy to benefit many generations to come.

Dan Wiersum
Associate Vice President for Planned Giving

Why give to Bethel's Endowment?



An endowment financially sustains the [mission](#) and work of Bethel University. We established our endowment so Bethel can continue to be a Christ-centered institution, anchored on a biblically-based foundation, that strives to educate and energize men and women with excellence in leadership, scholarship, and service. Our endowment will help us carry on this important work for years to come.

Endowed Scholarships or Program Endowments

Many alumni and friends of Bethel support students and the university through endowed scholarships—either through gifts or [bequests](#) in a will or trust.

- **Endowed Scholarships:** By creating a named endowed scholarship, your gift remains intact as principal in the endowment. Once this principal reaches \$10,000, Bethel will then award annually a portion of the earnings to students as specified by the donor.
- **Estate Gift Scholarships:** as part of your estate—through your will, trust, or other gift vehicle—specify a gift for student scholarships. This

is an ideal way to add to an existing endowed scholarship, or fund a new endowed scholarship in honor of a loved one.

Rather than scholarships, some prefer to generate a **program endowment** to support a specific academic area or program.

Other Ways to Make Endowment Gifts:

Beneficiary Designations

Some of the most common assets that pass to us through **beneficiary designations** are:

- Checking, savings and/or mutual fund accounts
- Retirement accounts such as an IRA, 401(k) or 403(b)
- Life insurance policies
- Commercial annuities

Charitable Life Estates

Do you own a home, vacation property or farm? With a charitable life estate, you can make your gift to us today and continue to use and enjoy the property during your lifetime. This gift is as simple as deeding your property to us with a provision in the deed that permits your continued use. You are also entitled to tax benefits and the property is removed from your estate.

Charitable Life Income Plans

Charitable life income plans such as a **charitable gift annuity** and **charitable remainder unitrust** enable you to make a future gift to endow our work while protecting or enhancing your current financial security.

Find out how you can join hundreds of Bethel supporters to our endowment through legacy gifts to help current and future students afford a Christ-centered Bethel education. For specific questions, please call **Dan Wiersum** or the Planned Giving office at **651.635.8053**, or **planned-giving@bethel.edu**.

Gene and Kathleen Johnson



Gene & Kathleen
Johnson

Gene and Kathleen Johnson, who are committed to the local community newspaper world, have financially supported Bethel for more than a decade. In 2008 the couple established Bethel's Johnson Center for Journalism and Communication. The center introduces students to some of the top journalists and communicators in the world through on-campus lectures and special events.

The Johnsons have taken a layered approach to supporting the center. As part of their estate plans, they established a [charitable remainder unitrust \(CRUT\)](#) to help fund the center long-term while also providing tax advantages to their family as they enter retirement. Part of the residual value of the CRUT will be used to fund an [endowed scholarship](#) supporting journalism students with financial aid for generations to come. [Read more about their story and thoughts about journalism today.](#)

Support from the Johnsons help Bethel Journalism Students Gain Experience



This summer, you can find Bethel students interning at the *Pioneer Press*, Southwest News Media (*Shakopee Valley News*, *Chaska Herald*), Press Publications (*White Bear News*), *North News*, ABC/Sun Newspapers (*Anoka County UnionHerald*, *Stillwater Gazette*, *Union Times*), and the nonprofit ECHO.

Bethel students often compete with many non-Bethel students to land the positions, but they have a benefit the other students don't: a full paycheck. Gene and Kathleen Johnson—the donors behind the Johnson Center for Journalism and Communication—have set up a fund to make sure finances aren't standing in the way of students completing valuable internships.

[Read more about Conrad Engstrom '19, Maddie Christy '20, and Jasmine Johnson '20 and their paid internships through Bethel's Johnson Center for Journalism.](#)

Estate Planning Resources

Creating A Will is Easier Than You Think

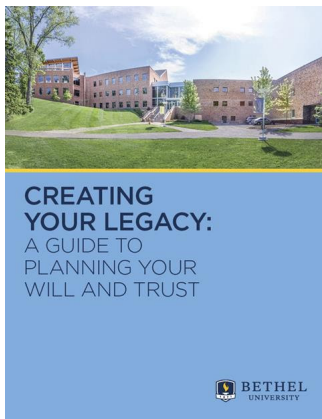
Creating your will is your opportunity to carefully articulate your wishes, your values, and your legacy. This planning is important to help you *Provide* for and *Protect* your loved ones and the charitable organizations you care about after you're gone.

If you are thinking about creating or updating a will or trust, we can help. Bethel's [website](#) includes a number of valuable resources about [wills and bequests](#), including wills videos, and a free personal and secure [online Wills Planner Account](#).

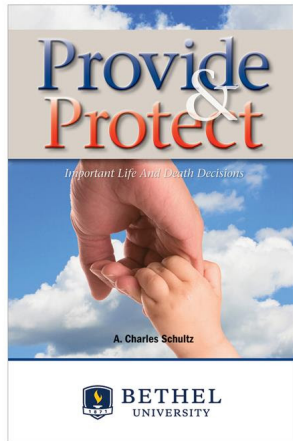
SPECIAL OFFER—Get Your FREE Wills Guide Legacy Pack

We would like to send you a **FREE Wills Guide Legacy Pack** with estate planning resources including:

- **Bethel Wills Guide – *Creating Your Legacy: A Guide to Planning Your Will and Trust.*** 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 and trust plan.



- ***Provide & Protect: Important Life Decision*** by A. Charles Schultz. This multimedia book is packed with tips on how to help you create a secure and satisfying future.
- **25 Estate Documents You Need To Put In One Place**
- And more estate planning tips...

Request a pack today by going to [Free Wills Guide](#), complete the request form, and write in the “**comments**” section: “**Wills Guide Legacy Pack.**”

[Bethel's estate planning experts](#) are also available to answer questions and help with bequest language to **Provide** for and **Protect** you and your family while creating an enduring legacy.

Planned Giving Events

Upcoming Fall Events:

- **Royal Nation: Anchorage** | August 3
- **Royal Nation: Denver** | September 28
- **Homecoming 2019** | October 4–6
- **Platinum Alumni Brunch** | October 5
- **Royal Nation: Des Moines** | October 14

- [Scholarship Appreciation Dinner](#) | November 6
- [Festival of Christmas](#) | December 5–7

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](#)

Savvy Living

Choosing an Executor for Your Will

Do you have any recommendations or tips for selecting an executor of a will? I am putting together my will and I want to make sure I know my options and choose someone who is capable ... [Read More](#)

Finances

Stocks—[Read Latest News—Stocks](#)

Bonds—[Read Latest News—Bonds](#)

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

Washington News

[Read Latest News—Washington](#)

Bethel's Planned Giving Team



Dan Wiersum '73, CSPG, MBA
Associate Vice President for Planned Giving



Marleen Smith
Manager for Planned Giving Operations

NEWS

EVENTS

GIVE

[Office of Planned Giving](#)

651.635.8053 (800.255.8706, ext. 8053)

planned-giving@bethel.edu

bethel.edu/planned-giving

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.

Bethel University | 3900 Bethel Drive | St. Paul, MN 55112 |
651.638.6400 | www.bethel.edu

You're receiving this because you're a Bethel Donor. If you'd no longer like to receive Donor Planned Giving emails, you can unsubscribe at any time.

[Unsubscribe](#)