

GIFT PLANNING

FOUR EASY GIVING OPTIONS



BEQUESTS

Include Bethany in your will by gifting a specific dollar amount, a percentage of your estate, or specific assets like cash, investments, or real estate.

YOUR BENEFITS:

You'll leave a lasting legacy for children and families. This giving option honors the values that are most important to you in your estate plans. And by designating Bethany in your will, you could potentially avoid various estate taxes.

HOW TO GET STARTED:

Visit Freewill.com/Bethany, contact your financial advisor, or contact Bethany's senior director of gift planning at the contact information below.

[Freewill.com/
Bethany](https://Freewill.com/Bethany)

DONOR-ADVISED FUNDS (DAF)

You can place various assets, like stocks, real estate, or art into these charitable accounts, reducing your tax liability. The funds are invested—and you can use the value over time to make charitable gifts.

YOUR BENEFITS:

The process is simple and gives you privacy, flexibility, and the opportunity to invest and grow your impact over time. Easily track gifts you've made and receive all your gift receipts in one place. You'll also receive a tax deduction.

HOW TO GET STARTED:

To set up a DAF, visit the National Christian Foundation website, a community foundation, or a wealth management firm (Fidelity, Schwab, etc.). To give from a DAF, contact your DAF custodian and instruct them to direct a contribution to Bethany Christian Services.

[NCFGiving.com/
Solutions/Giving-Fund](https://NCFGiving.com/Solutions/Giving-Fund)

QUALIFIED CHARITABLE DISTRIBUTIONS (QCD)

If you're at least 70.5 years old, you can make a qualified charitable distribution—a gift from your individual retirement account (IRA) to Bethany.

YOUR BENEFITS:

You can reduce income and estate taxes when you gift all or part of your required minimum distribution to Bethany to protect children and strengthen families.

HOW TO GET STARTED:

Visit Freewill.com/QCD/Bethany for instructions on how to make a QCD directly to Bethany, or contact your investment manager for their assistance in making the gift.

[Freewill.com/
QCD/Bethany](https://Freewill.com/QCD/Bethany)

GIFTS OF SECURITIES

Make a gift of securities, like publicly traded stocks, bonds, or mutual funds. These can be easily traded between your investment management company (Fidelity, Schwab, etc.) and Bethany.

YOUR BENEFITS:

You can use your investments for good and avoid capital gains tax at the same time.

HOW TO GET STARTED:

Simply, fill out a letter of intent, or ask your broker to do so on your behalf, and mail the completed form to Bethany's senior director of gift planning
Bethany Christian Services
901 Eastern Ave NE
PO Box 294
Grand Rapids, MI
490501-0294

Bethany.org/LOI