

# YOUR GIFT PLANNING JOURNEY



## PLANNING YOUR LEGACY GIFT STRATEGIES

Three strategies to help you plan ahead

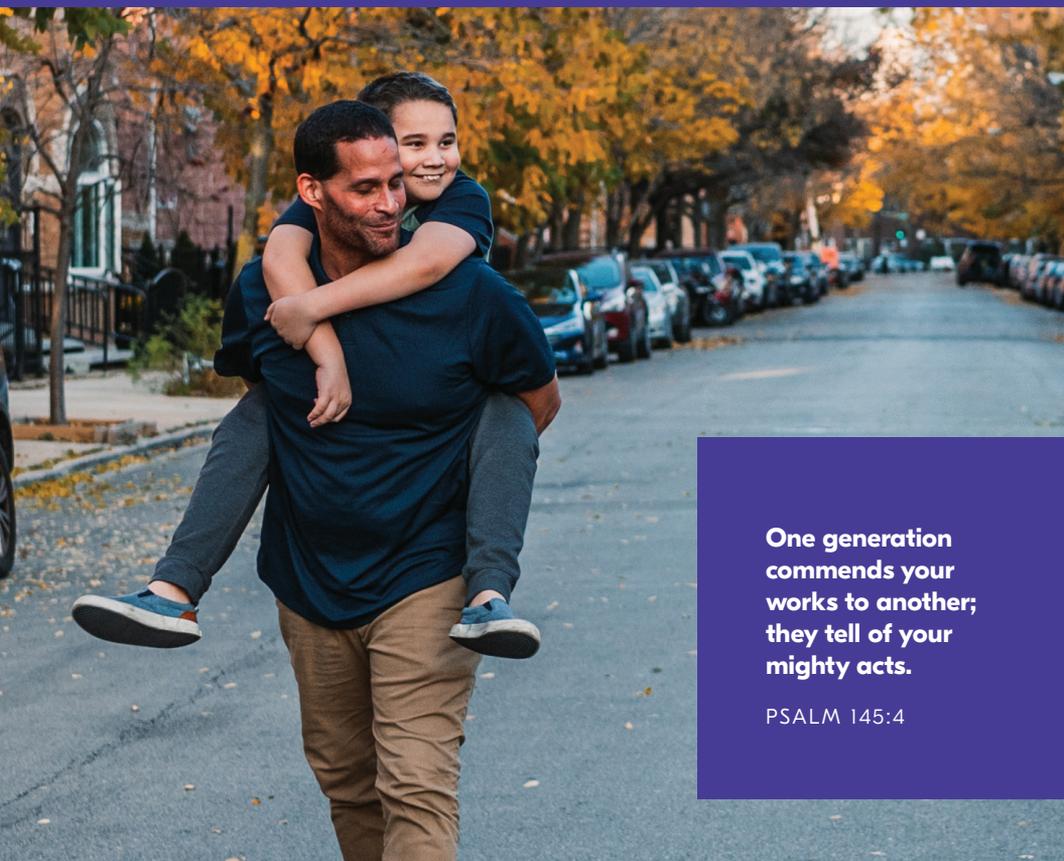
PART 4

**For more than 75 years, our faith has inspired us to serve children close to home and around the world.**

**Our core beliefs are simple:  
We love God, and we love people.**

**Your legacy gift is your faith in action.**

**These three gift planning strategies put into practice your faith, wisdom, and passion to serve children and families by financially sustaining Bethany's mission—now and for generations to come.**



**One generation  
commends your  
works to another;  
they tell of your  
mighty acts.**

PSALM 145:4

# Three powerful gift planning strategies

## 1. THERE IS POWER IN REMEMBERING BETHANY IN YOUR WILL

**Suggested bequest:** I give to Bethany Christian Services, a nonprofit ministry with principal offices at 901 Eastern Ave NE, Grand Rapids, MI 49501, the sum of (\$\_\_\_\_\_ or \_\_\_\_\_%) of the residue of my estate. I desire that these funds be used for (its general purposes or for the specific purpose of \_\_\_\_\_).

If, in its opinion, this specific purpose no longer exists, I authorize Bethany Christian Services to use these funds for a similar purpose.

## 2. THERE IS POWER IN MAKING BETHANY A BENEFICIARY

You can name Bethany as a sole or shared beneficiary of your life insurance policy, your retirement assets like an IRA, 401(k), and other financial accounts. To add Bethany as a beneficiary on any of these products, reach out to your retirement account manager, life insurance company, or estate planning contact.

Be sure to include Bethany Christian Service's legal name, address, and Federal Tax ID Number (38-1405282) in your updated will, life insurance policy, or other financial instruments.

## 3. THERE IS POWER IN ANNUITY GIFTS

Annuity gifts help you plan for steady income for yourself or a loved one while providing significant support through Bethany to families facing crisis. Your gift's income can start whenever you like and can be directed to yourself, a loved one, or directly to Bethany.

**New: Beginning in 2023, you can use a retirement account to fund your annuity gift. A win-win!**

- **Charitable gift annuities** allow you and a loved one to receive income for a defined period of time—in retirement or for life—depending on how it's set up. You can start receiving that income now or defer it to a date you select in the future.
- **Charitable remainder trusts** allow even more flexibility by allowing you to name non-spousal beneficiaries.
- **Charitable lead trusts** allow you to provide Bethany with annuity payments for a set period of time, returning the principal to you or your beneficiary at the end of the trust agreement.

# HOW PLANNED GIVING CHANGES LIVES



After recovering from drug addiction and the traumas of trafficking, Lucy shares, “I’m close to earning my GED. I got my drivers permit, I have a job, and I’m saving money so I can get an apartment for me and my kids. I’m drug-free and, for the first time, I feel hopeful about our future.”



**FIND MORE INFORMATION AND RESOURCES AT**

**[Bethany.org/GiftPlanning](https://Bethany.org/GiftPlanning)**

**[FreeWill.com/Bethany](https://FreeWill.com/Bethany)**

**TO GET STARTED WITH ANY OF THESE OPTIONS,  
CONTACT OUR SENIOR DIRECTOR OF GIFT PLANNING AT**

**[GiftPlanning@Bethany.org](mailto:GiftPlanning@Bethany.org)**

**CORPORATE HEADQUARTERS**

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**This information is not intended as financial or legal advice. Always consult with a professionally licensed tax advisor or estate attorney before making decisions.**