



Estate Gifts

Help Shape Notre Dame's Future through a Legacy of Impact

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Help Shape Notre Dame's Future through a Legacy of Impact

A planned gift represents a powerful opportunity for members of the Notre Dame family to realize their philanthropic aspirations. Through estate gifts, alumni, parents, and friends can extend their impact on the University in perpetuity, shaping the Notre Dame experience for generations to come.

You can plan for an enduring legacy of impact at Notre Dame in either or both of the following ways:

- **Bequest:** Include a charitable provision in your will or revocable trust, designating a specific amount, percentage, or asset to Notre Dame.
- **Retirement Plan Beneficiary:** Name Notre Dame as a full or partial beneficiary of your retirement account (IRA, 401(k), etc.).

PARTNER WITH NOTRE DAME IN YOUR PLANNING

Whether you are in the initial stages of estate planning or have already included Notre Dame in your will or trust, we encourage you to connect with our team. A Gift Planning Officer from Notre Dame is ready to help you structure your gift to maximize your philanthropic impact, minimize tax burdens, and ensure that your intentions for the use of your estate gift are carried out.

If you have already included a gift to Notre Dame in your estate plans, we encourage you to connect with us to share your intentions. Doing so allows the University to strategically plan for the future, ensuring Notre Dame will continue to flourish and fulfill its mission of teaching, research, and service for generations to come.

THE BENEFITS OF ESTATE GIVING

- **Retain Control:** Maintain full access and control of your assets during your lifetime.
- **Maintain Flexibility:** Modify your gift intentions at any time to reflect changing circumstances.
- **Secure Tax Advantages:** Minimize or avoid federal estate and income taxes.
- **Maximize Your Impact:** Estate gifts are often the most significant gift a family will make to the University, providing an avenue to have an impact far beyond what would be possible during one's lifetime.

A CALL TO ACTION: SHAPE NOTRE DAME'S FUTURE

The loyalty of the Notre Dame family is unparalleled. By making your planned gift intentions known to Notre Dame, you join a dedicated group of individuals committed to ensuring the University's continued ability to realize its sacred and unique mission. Join us in shaping Notre Dame's future and empowering the next generation of Notre Dame leaders.

Building a Legacy Together: Supporting Notre Dame Through Your Estate Plans

When considering a bequest in your will or revocable trust, a few options are available:

METHODS OF GIVING

- **Percentage Bequest:** Designate a specific percentage of your estate or trust to Notre Dame, ensuring your gift reflects the overall value of your assets.
- **Residuary Bequest:** Direct the remaining balance of your estate or trust to Notre Dame after all expenses, debts, and specific bequests have been fulfilled.
- **Specific Bequest:** Designate a fixed dollar amount or a particular asset, such as real estate, to Notre Dame.

Whether your estate gift is included in your will or revocable trust or is made through designation of a retirement account to Notre Dame, you have options in determining how your gift will be used.

DEFINING YOUR GIFT'S PURPOSE

- **Unrestricted Estate Gifts:** These gifts provide Notre Dame with the flexibility to allocate your generosity to the University's most pressing needs and strategic priorities. They empower Notre Dame to seize emerging opportunities and address unforeseen challenges.
- **Restricted Estate Gifts:** These gifts allow you to direct your support to a specific program or purpose, such as scholarships, faculty research, a particular academic department, or athletics. This ensures your gift directly impacts the area you are most passionate about. Any intention to restrict the use of an estate gift should be discussed with a Gift Planning Officer to ensure Notre Dame is able to carry out your intentions.

ENGAGING IN LEGACY PLANNING WITH NOTRE DAME

Whether you are in the initial stages of estate planning or have already included Notre Dame in your will or trust, we encourage you to connect with our team. This conversation can be invaluable for several reasons:

- **Expert Guidance:** Our gift planning specialists can collaborate with you and your legal counsel to ensure your bequest language accurately reflects your intentions and maximizes its impact.
- **Tax Optimization:** Our team can assist in structuring your gift to optimize potential tax benefits for both you and your heirs, allowing your generosity to extend further.
- **Expressing Gratitude:** Informing Notre Dame of your intentions allows us to express our sincere appreciation for your commitment to our mission and to recognize your profound generosity.





The University of Notre Dame is an educational institution and does not provide tax, legal, or financial advice. Any document or information provided to you by our staff is intended to be educational and informational. Notre Dame strongly encourages all of our donors to seek counsel from their own legal and financial advisors. Please know that any information or document shared by the development staff cannot be used to avoid tax-related penalties. Actual year-to-year performance of the Notre Dame Endowment varies, and past performance does not guarantee future results.