



BADIN
GUILD
NOTRE DAME

FISCAL YEAR 2023 IMPACT REPORT



BUILDING A MEANS FOR GOOD

This report provides an overview of the incredible generosity of Notre Dame's Badin Guild, including testimonials on the impact of members' planned gifts.

During fiscal year 2023, the University received 2,190 new planned gifts totaling more than \$645M. Additionally, over \$60M of realized planned gifts was made available to the University. These gifts take the form of various planned giving vehicles, including bequests, charitable remainder trusts, donor advised funds, and IRA distributions.



"The University's mission calls us to act as a force for good. By making Notre Dame a part of your estate plan, you help future generations achieve that through research, innovation, education, and service. Thank you for your enduring generosity."

SHANNON CULLINAN
EXECUTIVE VICE PRESIDENT

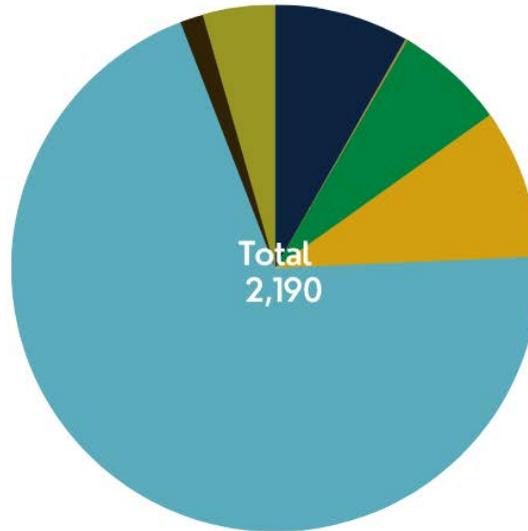


FISCAL YEAR 2023

New Planned Gifts Received

Number of Gifts by Type

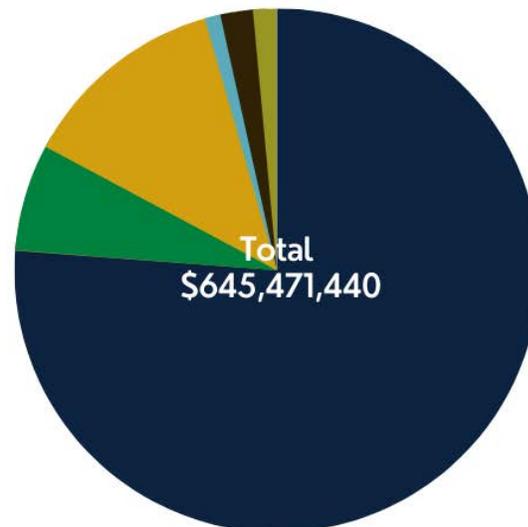
Bequests	180
Charitable Gift Annuities	3
Charitable Remainder Trusts	148
Donor Advised Funds	201
Qualified Charitable Distributions from IRAs	1530
IRA Beneficiary Designations	31
Other	97



New Planned Gifts Received

Gift Types in Dollars

Bequests	\$491,847,148
Charitable Gift Annuities	\$174,876
Charitable Remainder Trusts	\$42,557,949
Donor Advised Funds	\$82,273,403
Qualified Charitable Distributions from IRAs	6,256,059
IRA Beneficiary Designations	\$12,906,839
Other	\$9,455,166



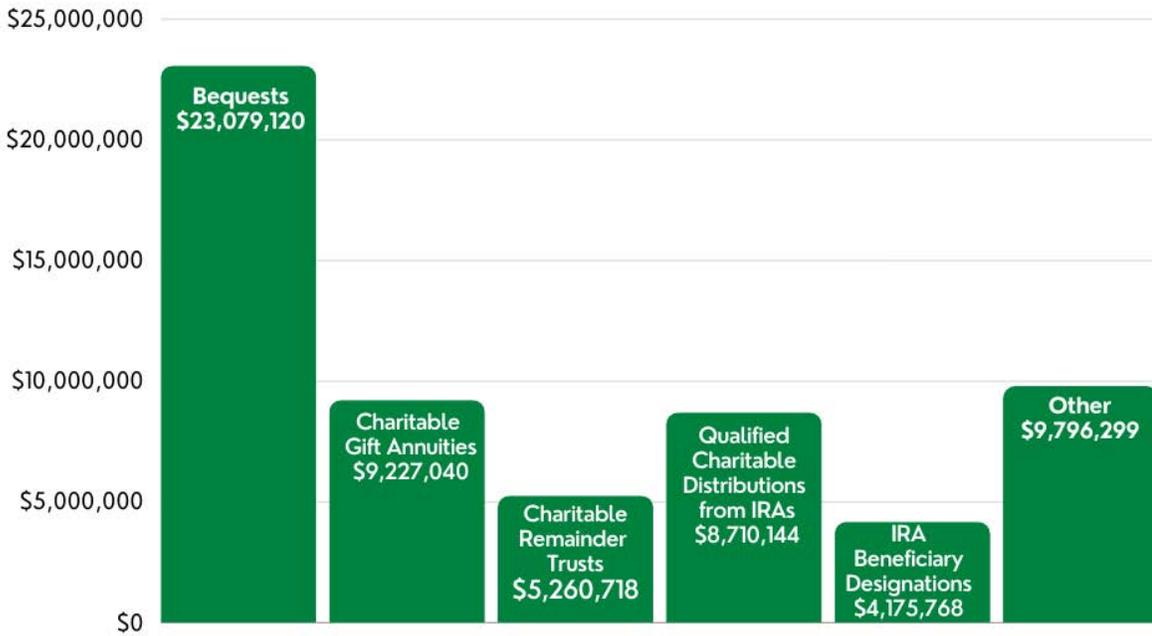
Notes

- New planned gifts include outright gifts, pledges, and deferred gifts.
- The number of charitable remainder trusts represents gifts and pledges made to new and existing CRTs.
- The number of donor advised funds includes all outright gifts and pledges to retained funds and distributable funds.
- Other includes gifts-in-kind, life insurance, privately held stock, and trusts held outside Notre Dame.



FISCAL YEAR 2023

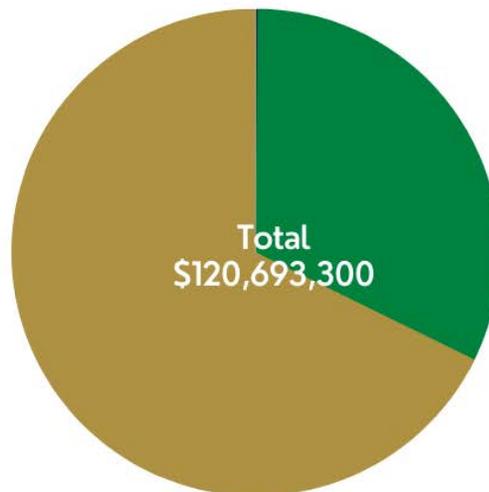
Realized Planned Gifts Total \$60,249,089



In the same period, grants valued at \$34,615,492 were made to Notre Dame programs from donor advised funds at the University.

Gift Planning Cash Receipts

Charitable Gift Annuities	\$174,876
Charitable Remainder Trusts	\$38,757,949
Donor Advised Funds	\$81,760,475



Notes

- Other includes gifts-in-kind, life insurance, privately held stock, and trusts held outside Notre Dame.
- Cash receipts represents actual dollars received by the University during this timeframe which are subject to restrictions.
- Donor advised funds include retained funds and distributable funds.



THE IMPACT OF BEQUESTS

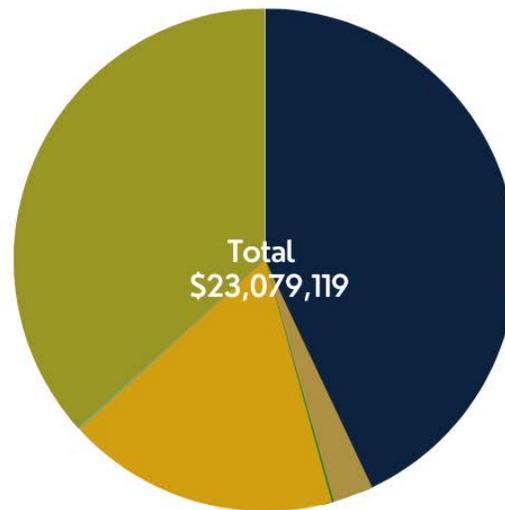


"In 2011, Meredith and I established a charitable remainder trust at Notre Dame both for retirement income and to support my alma mater. Last year, we established a second charitable remainder trust to provide lifetime income for our son. As we discussed our legacy, we designated this trust at Notre Dame to receive funding as a considerable part of our revised estate. We wanted our son to have secure lifetime income, utilizing a fiduciary we trusted, and to provide a lasting benefit to others long after our own lives. We have the peace of mind that our objectives will be accomplished. Notre Dame checked all the boxes and it made perfect sense."

MEREDITH & JOHN RIVERS '68

Realized Bequest Allocations

Academics & Student Life	\$9,924,256
Athletics	\$600,286
Catholic Mission	\$25,500
Undergraduate Financial Aid	\$4,050,104
Undesignated	\$25,001
Unrestricted	\$8,453,972



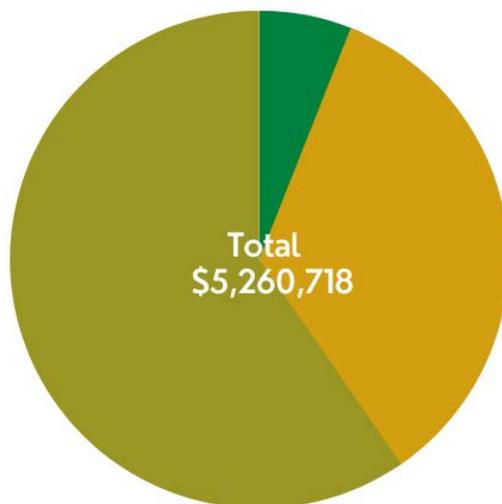
In fiscal year 2023, Notre Dame realized \$23,079,119 from bequests. Areas impacted by these gifts span a range of purposes in categories such as Academics & Student Life, Athletics, Catholic Mission, Undergraduate Financial Aid, Undesignated and Unrestricted—funding that can be allocated as needed—and beyond. In the same year, Notre Dame received 180 bequest intentions valued at \$491,847,148.



THE IMPACT OF CHARITABLE REMAINDER TRUSTS

Realized Charitable Remainder Trust Allocations

Catholic Mission	\$314,859
Undergraduate Financial Aid	\$1,807,447
Unrestricted	\$3,138,412



In fiscal year 2023, 148 gifts valued at \$42,557,949 were made to new and existing charitable remainder trusts, and \$5,260,718 was realized and allocated to Catholic Mission, Undergraduate Financial Aid, and Unrestricted funding.



"We cherish the compassionate Catholic mission and irresistible Irish spirit of the University of Notre Dame. We see our charitable remainder trust as a 'win-win-win' that honors the past sacrifices of our parents, provides an income stream today, and helps build a solid foundation for future students."

JILL & DREW GRIMES '84



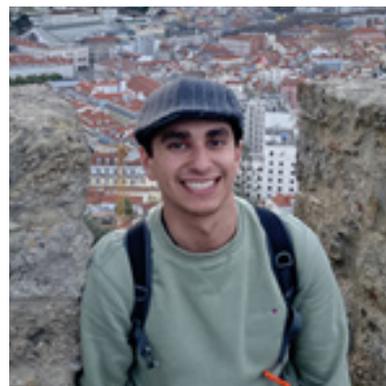
THE IMPACT OF DONOR ADVISED FUNDS



"To express gratitude for our own experiences and opportunities at Notre Dame, especially Elizabeth's year in Spain, we established a scholarship fund to support students studying abroad. Our donor advised fund allowed us to build the scholarship over time and pursue our charitable goals both on- and off-campus in the context of a thoughtful but flexible long-term plan, while benefiting from the University's incredible investment returns."

ELIZABETH '95 & BRET DOOLEY '95

"Thanks to the Dooley family, I was able to study abroad in Toledo, Spain last year. I thoroughly enjoyed my experience; I visited many Spanish cities as well as Fatima, Portugal, and Lourdes, France! Their generosity made my dream of studying abroad in Spain come true. I hope to become fluent in Spanish by the end of my program so that I can connect with my Colombian heritage and converse with my grandparents in Spanish! I am so grateful to Mr. and Mrs. Dooley for my education and the opportunities that come with attending Notre Dame!"



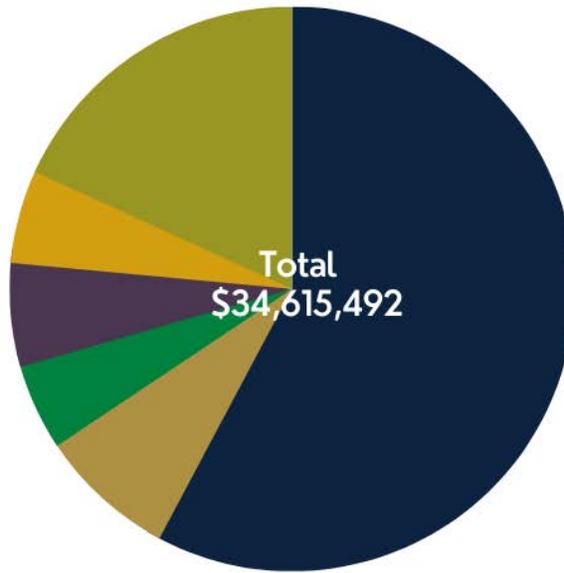
EMMANUEL LEVY '24

BRET & ELIZABETH DOOLEY SCHOLARSHIP RECIPIENT



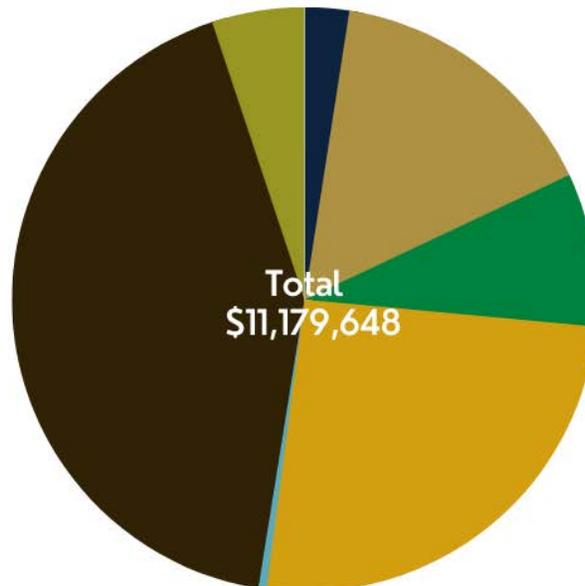
Donor Advised Fund Grants to Notre Dame Programs

Academics & Student Life	\$19,998,194
Athletics	\$2,716,700
Catholic Mission	\$1,703,000
Capital Projects	\$2,050,000
Undergraduate Financial Aid	\$1,847,750
Unrestricted	\$6,299,848



Donor Advised Fund Grants to Other Qualified Charities

Arts & Culture	\$274,318
Education	\$1,736,350
Health	\$950,000
Human Services	\$2,861,500
International, Foreign Affairs	\$50,000
Public, Societal Benefit	\$4,736,000
Religion	\$571,480



In fiscal year 2023, 201 contributions valued at \$82,273,403 were made to new and existing donor advised funds. During this same time period, benefactors recommended grants totaling \$34,615,867 to programs at the University and \$11,179,648 million to other qualified charities.



THE IMPACT OF INDIVIDUAL RETIREMENT ACCOUNTS

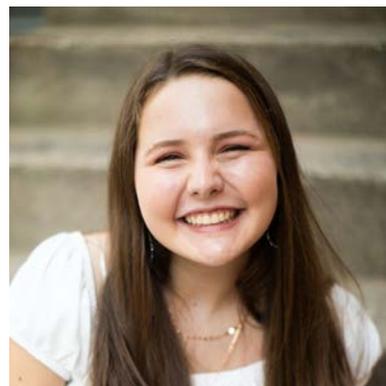


"Though I have been a Sorin and St. Thomas More Society member for a long time, I wanted to express my loyalty and appreciation for my alma mater in a more significant way. When my mother succumbed to Alzheimer's in 2008, I decided to memorialize her life by establishing scholarships in her name.

"I am funding these scholarships through Qualified Charitable Distributions from my IRAs and periodic distributions from my Charitable Donor-Advised Giving Fund. In addition, by making Notre Dame a beneficiary of my IRAs, I am comforted to know that through these scholarships, and the many students who will benefit from them, my dear mother will be remembered for many years to come."

FRED BERNARDI '72, '75 J.D.

"I want to express my sincere thanks to Mr. Bernardi for his generous contribution to my scholarship. Notre Dame is everything I thought it would be and more. I have made wonderful friends and met amazing teachers. Most importantly, I have grown in my faith and as a person. Notre Dame has slowly been changing me for the better and I am so incredibly grateful for the experience."



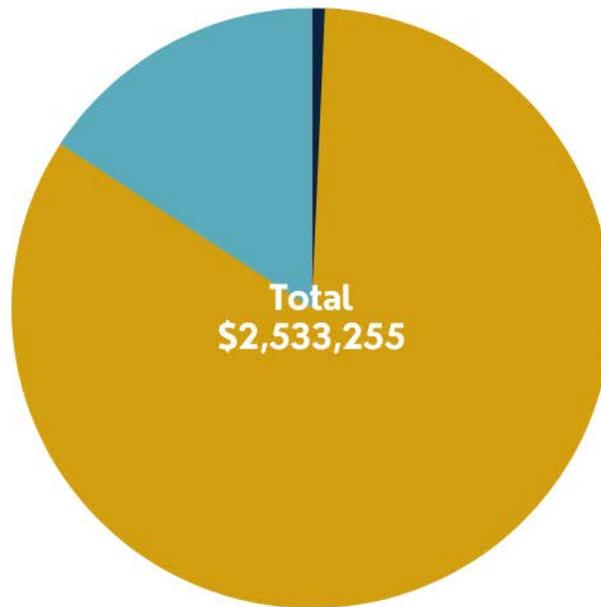
THERESE BARRETT '26

ALMA M. BERNARDI MEMORIAL SCHOLARSHIP RECIPIENT



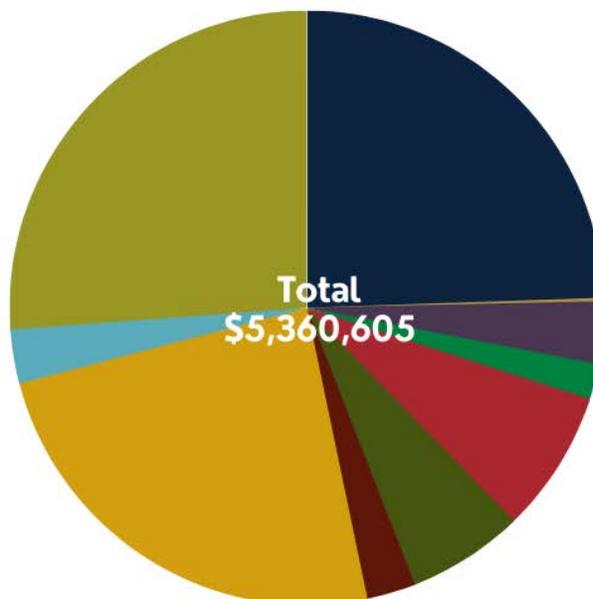
Realized IRA Beneficiary Designations

Academics & Student Life	\$17,823
Undergraduate Financial Aid	\$2,115,432
Undesignated	\$400,000



Qualified Charitable Distributions from IRAs

Academics & Student Life	\$1,311,164
Athletics	\$10,000
Capital Projects	\$182,000
Catholic Mission	\$103,000
Graduate Financial Aid	\$416,870
Other	\$339,889
Research	\$142,100
Undergraduate Financial Aid	\$1,294,977
Undesignated	\$157,350
Unrestricted	\$1,403,255



In fiscal year 2023, \$2,533,255 was realized from individual retirement accounts and allocated across Academics & Student Life, Undergraduate Financial Aid, and Undesignated funds.

During this same time period, Notre Dame received qualified charitable distributions from IRAs totaling \$5,360,605.



THANK YOU



"I am deeply grateful for your dedication to Notre Dame's mission. Know that your generosity will bear great fruit, benefitting future generations as Notre Dame strives through scholarship, research, leadership, and service to be a force for good in the world. May God continue to bless you and your loved ones. You are always in my prayers."

REV. JOHN I. JENKINS, C.S.C.
PRESIDENT



**BADIN
GUILD**
NOTRE DAME

badin1@nd.edu
www.giving.nd.edu/badin



UNIVERSITY OF
NOTRE DAME