



ESTATE GIFT CONFIRMATION

If you have made provisions in your estate for a gift to the University of Notre Dame, please take a moment to complete the form below and return it to us. ***This document does not bind you or your estate.*** You may choose to increase, decrease, or revoke this bequest at any time, at your sole discretion. The details on this form as well as any additional information you wish to share with us will remain confidential.

Name(s)

Address City, State Zip

Phone Email

I/We have executed documents to name Notre Dame as a beneficiary in one or more:

Will IRA, pension, or other retirement account Revocable or Living Trust

Charitable Remainder Trust (Trustee is not Notre Dame)

Other (please specify) _____

This is stated as a: Specific dollar amount Percentage Other (Residuary, etc.)

An estimate of the current value of my/our gift to Notre Dame is: _____

Gift designation (if any):

To support Notre Dame's areas of greatest need

Specific purpose _____

Undetermined (may be revisited at a later date)

Signature Signature Date

WELCOME TO THE BADIN GUILD

The Badin Guild is the recognition society named for Father Stephen Theodore Badin, who made the first planned benefaction to Notre Dame. By completing this form, you will automatically be enrolled in the Badin Guild.



FREQUENTLY ASKED QUESTIONS ABOUT ESTATE GIFTS

When is the right time to complete, sign, and share this Estate Gift Confirmation Form with Notre Dame?

Notre Dame invites benefactors to share this completed and signed form at any time following the execution of your estate plans (or estate plan updates) that include a gift to Notre Dame.

I have included a gift to Notre Dame in my will, trust, or as the beneficiary of a retirement account. Why should I share a snapshot of those plans with Notre Dame?

Most importantly, sharing your plans provides the University the opportunity to express gratitude, during your lifetime, in personally meaningful ways. In addition, doing so allows us to plan *with* you in ensuring that your gift is used as you intend. Finally, although estate plans may be amended or revoked at any time in a benefactor's sole discretion, sharing your plans inspires hope and confidence for Notre Dame leadership in planning for the future.

Notre Dame is named to receive a percentage or share of my estate, which means that the value of my gift is constantly changing and could increase or decrease over time. Does Notre Dame still want me to provide an approximate, current value of my gift?

Yes. Notre Dame appreciates that the value of many estate gifts to the University can and will change over time. Nevertheless, we invite you to share an approximate current value of your gift so that we can appropriately thank you and plan with you in the use of your gift.

If I inform the University that I have included a gift to Notre Dame in my estate plans, do I have the right to revise or revoke the gift at a later date?

Yes. Estate commitments to Notre Dame are typically non-binding and subject to change, or revocation, in a benefactor's sole discretion. If a change is made to your estate plans, we would simply ask you to inform Notre Dame so that we can update the University's records accordingly.

May I designate the use of my estate gift?

Yes. While many of Notre Dame's benefactors elect to leave their estate gift unrestricted so that University leadership can direct it to the areas of greatest need, others choose to designate their gift to a specific purpose—often involving the creation or further funding of an endowed fund. Simple agreements between a benefactor and Notre Dame are often prepared to state in detail the area(s) at the University to be supported by an estate gift and the administrative terms of any endowed funds to be established. If you intend to designate your estate gift to a specific purpose and/or establish an endowed fund with your estate gift, please contact us so that we can discuss your intentions and ensure that we are able to meet them.

If I have further questions about this topic, who should I contact?

You are welcome to e-mail us at pgiving@nd.edu or call us at 574-631-7164 and a member of the Gift Planning team will be pleased to respond as soon as possible.

