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Love Thee Notre Dame

BOLDLY IMPACTING NOTRE DAME’S FUTURE

From the beginning, planned gifts have had a tremendous impact on Notre Dame. It was essentially a “planned gift” of more than 500 acres of land from Reverend Fr. Stephen Theodore Badin which led to the historic founding of the University of Notre Dame by Father Edward Sorin in the year 1842.

Notre Dame has been blessed by the generosity of countless benefactors and we are eternally grateful for the impact these gifts have made. Your planned gifts ensure that Notre Dame, one of the few religiously affiliated institutions among leading schools, will continue to shape global conversations, inform public policy, contribute to world-changing research, and form leaders for tomorrow.

Thank you for empowering future generations of Notre Dame students to be a force for good in the world through your planned gift.

The Stephen Theodore Badin Guild

When you make a planned gift to the University of Notre Dame, you become a member of the Badin Guild. Named in honor of Reverend Fr. Stephen Theodore Badin, the first Roman Catholic priest ordained in America who also made the first major benefaction to Notre Dame, the Badin Guild is our humble way to express our gratitude for all planned gifts to the University of Notre Dame. Please note that planned gifts of any size or type qualify for membership in the Badin Guild.

The impact of your gift will last forever—and provide many students the gift of a lifetime: a Notre Dame education.
New Planned Gifts Received

FISCAL YEAR 2019

Number of Gifts by Type

1,248
Total Number of Planned Gifts

Dollars

$247,149,542
Total Planned Gifts in Dollars

<table>
<thead>
<tr>
<th>Type</th>
<th>Number</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bequests</td>
<td>228</td>
<td>$161,668,426</td>
</tr>
<tr>
<td>Charitable Gift Annuities</td>
<td>8</td>
<td>$997,506</td>
</tr>
<tr>
<td>Charitable Remainder Trusts</td>
<td>153</td>
<td>$24,668,884</td>
</tr>
<tr>
<td>Donor Advised Funds</td>
<td>131</td>
<td>$30,624,788</td>
</tr>
<tr>
<td>Individual Retirement Accounts</td>
<td>699</td>
<td>$14,511,387</td>
</tr>
<tr>
<td>Other</td>
<td>29</td>
<td>$14,678,551</td>
</tr>
</tbody>
</table>

1 Includes outright gifts, non-deferred pledges, deferred pledges, and deferred gifts.
2 Represents gifts made to new and existing charitable remainder trusts held in the Notre Dame Endowment.
3 Includes all outright gifts and pledges to Retained Funds and Distributable Funds.
4 Includes life insurance, notices of probate, privately held stock, and trusts held outside Notre Dame.
## Total Planned Gifts Invested in the Notre Dame Endowment

**As of June 30, 2019**

<table>
<thead>
<tr>
<th>Type of Planned Gift</th>
<th>Number</th>
<th>Assets Under Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charitable Gift Annuities</td>
<td>138</td>
<td>$25,875,189</td>
</tr>
<tr>
<td>Charitable Remainder Trusts</td>
<td>562</td>
<td>$248,231,016</td>
</tr>
<tr>
<td>Donor Advised Funds</td>
<td>105</td>
<td>$132,748,940</td>
</tr>
</tbody>
</table>

- **805** Gift Instruments
- **$406,855,145** Total Assets Under Management
Realized Planned Gifts

FISCAL YEAR 2019

- $26,150,919 Bequests
- $2,824,875 Charitable Gift Annuities
- $13,662,529 Charitable Remainder Trusts
- $4,870,570 Individual Retirement Accounts - Living Distributions
- $1,933,067 Individual Retirement Accounts - Death Benefits
- $7,578,551* Other
- $57,020,511 Total FY19 Realized Gifts

*Includes life insurance, privately held stock, and trusts held outside Notre Dame.
Gift Planning Cash Receipts*

FISCAL YEAR 2019

$917,506 Charitable Gift Annuities

$19,700,607 Charitable Remainder Trusts

$25,176,399** Donor Advised Funds

$47,794,512 Total Cash Receipts

*Cash receipts represent actual dollars received by the University during this timeframe which are subject to restrictions.

**Includes Retained Funds and Distributable Funds.
Bequests

For many alumni, parents, and friends, a bequest is the simplest and best way to create a meaningful and influential legacy at Notre Dame. A bequest allows you to retain control of your assets during your lifetime, while also making a significant gift to the University.

Thanks to the generosity of many members of the Notre Dame family, in FY19 Notre Dame realized $26,150,919 from bequests. These gifts were allocated across Academics and Student Life, Undergraduate Financial Aid, Unrestricted funding which the University can allocate as needed, and other priorities. In the same year, Notre Dame received 228 Bequest intentions valued at $161,668,426.
Charitable Gift Annuities

A charitable gift annuity is a gift that provides financial security for you or a loved one, while also ensuring future resources for Notre Dame. A charitable gift annuity is a powerful planned gift to Notre Dame that offers you fixed payments for life and the opportunity to impact future generations of Notre Dame students.

With a charitable gift annuity, you make a gift of cash or other property to Notre Dame and, in return, the University agrees to make fixed payments to you and your spouse and or a designated beneficiary (also known as the annuitant) for life. A Notre Dame charitable gift annuity is backed by the University’s full assets. Notre Dame holds a credit rating of “Aaa” from Moody’s Investor Service.

As of June 30, 2019, Notre Dame had 138 charitable gift annuities under management with a total value of $25,875,189. In FY19, 8 charitable gift annuities valued in total at $997,506 were received as gifts, and $2,824,875 was realized and allocated across Academics and Student Life, Undergraduate Financial Aid, and Unrestricted funding which the University can allocate as needed.
Charitable Remainder Trusts

By establishing a charitable remainder trust with Notre Dame, you and your spouse will receive payments for life or for a specified number of years. Trust assets that remain after you pass away or at the end of the trust term pass to Notre Dame, where they will be used as designated by you.

Charitable remainder trusts invested in the Notre Dame Endowment have the potential for significant growth, as the Endowment routinely outperforms market indices.*

As of June 30, 2019, Notre Dame had 562 charitable remainder trusts under management with a total value of $248,231,016. In FY19, 153 gifts valued at $24,668,884 were made to new and existing charitable remainder trusts, and $13,662,529 was realized and allocated across Academics and Student Life, Catholic Mission, Undergraduate Financial Aid, and Unrestricted funding which the University can allocate as needed.

*Past performance does not guarantee future results.

Realized Charitable Remainder Trust Allocations
FISCAL YEAR 2019

- **$10,052,629** Catholic Mission
- **$1,030,036** Undergraduate Financial Aid
- **$135,386** Unrestricted
- **$2,444,478** Academics & Student Life
- **$13,662,529** Total Realized Charitable Remainder Trust Allocations
Donor Advised Funds

The Notre Dame Donor Advised Fund is a powerful philanthropic vehicle that leverages the Notre Dame Endowment, one of the best-performing endowments in higher education. It maximizes the impact of your gift to Notre Dame as well as other qualified charitable organizations.

The Notre Dame Donor Advised Fund offers an alternative to the expense and legal complexity of operating a private foundation while simplifying your philanthropic giving. By establishing a Notre Dame Donor Advised Fund, you enable Notre Dame to receive, invest, and administer gifts to the University and to make distributions to other qualified charitable organizations, according to your recommendations.

As of June 30, 2019, Notre Dame had 105 donor advised funds under management with a market value of $132,748,940 split between the Retained Funds and Distributable Funds. Over $66 million of this total was in Retained Funds which ultimately benefits Notre Dame.

Thirteen DAFs valued at $9.5 million were created in FY19. Benefactors recommended grants totaling nearly $28 million to programs at the University and over $10 million to other qualified charities during this time period.

Donor Advised Fund Transfers to Notre Dame Programs

<table>
<thead>
<tr>
<th>Fiscal Year 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academics &amp; Student Life</td>
</tr>
<tr>
<td>Athletics</td>
</tr>
<tr>
<td>Capital Projects</td>
</tr>
<tr>
<td>Catholic Mission</td>
</tr>
<tr>
<td>Financial Aid</td>
</tr>
<tr>
<td>Unrestricted</td>
</tr>
</tbody>
</table>

Total Donor Advised Fund Transfers to Notre Dame Programs: $27,972,564
Donor Advised Fund Market Value of Funds Designated for Notre Dame

**AS OF JUNE 30, 2019**

<table>
<thead>
<tr>
<th>Category</th>
<th>Market Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undesignated</td>
<td>$58,842,609</td>
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<tr>
<td>Catholic Mission</td>
<td>$3,577,939</td>
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<tr>
<td>Financial Aid</td>
<td>$2,741,860</td>
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<tr>
<td>Academics &amp; Student Life</td>
<td>$726,571</td>
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<tr>
<td>Unrestricted</td>
<td>$621,098</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$66,510,077</strong></td>
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</table>

Donor Advised Fund Transfers to Other Qualified Charities*

**FISCAL YEAR 2019**

<table>
<thead>
<tr>
<th>Category</th>
<th>Transfers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts &amp; Culture</td>
<td>$315,834</td>
</tr>
<tr>
<td>Education</td>
<td>$6,153,019</td>
</tr>
<tr>
<td>Environment &amp; Animals</td>
<td>$47,500</td>
</tr>
<tr>
<td>Health</td>
<td>$355,000</td>
</tr>
<tr>
<td>Human Services</td>
<td>$2,092,687</td>
</tr>
<tr>
<td>Religion</td>
<td>$1,437,208</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$10,401,248</strong></td>
</tr>
</tbody>
</table>

* Includes distributions to outside charities and transfers from Distributable Funds to Retained Funds.
Individual Retirement Accounts

An individual retirement account (IRA) offers two ways to make an impact at Notre Dame: 1) through IRA Charitable Rollovers during your lifetime, and 2) by making a charitable bequest of part or all of your IRA (or other retirement account) to Notre Dame.

**IRA Charitable Rollover**

If you are 70 ½ years of age or older and have a traditional individual retirement account (IRA) you can make an immediate impact at Notre Dame through an IRA Charitable Rollover gift. An IRA Charitable Rollover allows you to make a gift to Notre Dame, satisfy part or all of any required minimum distribution (RMD) from your IRA, and exclude part or all of that distribution from your taxable gross income, thereby reducing your tax liability.

Your IRA Charitable Rollover gift may be unrestricted and used to join or renew your membership in one of our giving societies, or you can direct your gift to another area of interest at Notre Dame.

For your gift to qualify:

- You must be 70 ½ years of age or older at the time of your gift.
- The transfer must be made from your IRA directly to Notre Dame.
- Your total annual IRA Charitable Rollover gift(s) cannot exceed $100,000 in the calendar year of the gift.
- Your gift must be outright.

**Realized IRA Living Distributions**

**FISCAL YEAR 2019**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Realized IRA Allocations</td>
<td>$4,870,570</td>
</tr>
<tr>
<td>From Living Distributions</td>
<td>53 gifts</td>
</tr>
</tbody>
</table>

- **Academics & Student Life** $1,510,158
- **Athletics** $51,050
- **Capital Projects** $156,086
- **Catholic Mission** $140,375
- **Graduate Financial Aid** $377,302
- **Other** $162,950
- **Undergraduate Financial Aid** $1,007,501
- **Undesignated** $160,500
- **Unrestricted** $1,304,648
Retirement Account Charitable Bequest
By designating Notre Dame as a beneficiary of your IRA or other retirement account, you may reduce or eliminate estate and/or income taxes at your passing. A bequest of your retirement account is one of the most tax-efficient ways to fund a charitable gift from your estate.

When a retirement account owner passes away, estate and income taxes on a retirement account may total 60 percent or more of the retirement account assets. By transferring your retirement account to Notre Dame directly upon your death, your estate may be able to claim a charitable estate tax deduction. In addition, your estate and your heirs will not report any taxable income from the gift related to the retirement account distribution to Notre Dame. Notre Dame will then receive the portion of the retirement account assets designated to the University and will apply the proceeds to an area of impact important to you that you designate during your lifetime.

Realized IRA Death Benefits
FISCAL YEAR 2019

$1,933,066
Total Realized IRA
Allocations from Death Benefits

6 Retirement Accounts

Academics & Student Life
$8,136

Undergraduate Financial Aid
$508,649

Undesignated
$810,007

Unrestricted
$606,274
Benefactor Impact

PHIL ’72 & SUSAN CALANDRA (SMC ’72)

Notre Dame has always played a major role in Phil and Susan Calandra’s story. The couple met as freshmen in 1969 when Phil, a Notre Dame Finance major and Rugby player from Buffalo, New York, and some of his friends ran into a group of Saint Mary’s students by the Sorin statue on campus. One of the women, Susan, an Economics and Business major who came from a Notre Dame family in Peoria, Illinois caught the eye of Phil. He offered to walk her back to her Saint Mary’s dorm, and they began dating soon afterwards. The couple married in 1974, two years after their college graduations.

In their initial years of marriage, the Calandras moved around quite a bit thanks to their budding careers, but in each new location they found Notre Dame and Saint Mary’s alumni clubs giving them instant access to friendships and strengthening the ties to their alma maters. The Calandras also stayed engaged with Notre Dame through their gifts to the Sorin Society and Men’s Rugby Program over the years, as well as gifts to Saint Mary’s.

Susan recalls how her father, John Scherer, a ’43 Notre Dame graduate, taught her to give back. Higher education has been a natural priority of the Calandra’s philanthropy as they see a quality Catholic education as the key to solving many of the planet’s most critical challenges. That focus has been reinforced through Susan’s 25 years as a senior financial executive at Stanford University and eleven years as a trustee at Saint Mary’s College, where she has seen firsthand how important philanthropy is to advancing the mission of higher education.

In 2016, the Calandras made the decision to establish a Charitable Remainder Trust (CRT) at Notre Dame. As Susan had overseen the accounting team at Stanford that managed CRTs, she was very familiar with the tax and income benefits this type of gift presented to benefactors. During this same time, Phil and Susan had become close to Cindy Parseghian through the Rugby team’s annual participation in The Parseghian Cup, an annual match versus the University of Arizona for the benefit of the Ara Parseghian Medical Research Fund (APMRF) at Notre Dame, which funds research to find a treatment for Niemann-Pick type C disease.
The Calandras used highly appreciated stock to fund their CRT. By doing so they enjoyed significant income tax benefits relating to capital gains and charitable donation deductions. In addition, Phil and Susan designated most of the remainder so that, upon termination of the trust, these funds will further research on Niemann-Pick Type C disease through the APMRF.

Through their CRT, Phil and Susan also became members of the Badin Guild, a Notre Dame Giving Society established to honor those who make the University a part of their personal legacy by making a planned gift. As members of the Badin Guild, they have had the opportunity to connect with other Badin Guild members who share their Catholic values and commitment to the mission of Notre Dame.

In 2019, the Calandras deepened their commitment to Notre Dame through a new testamentary CRT, which will be funded at their passing using qualified retirement plan assets. With the recent elimination of the “stretch” IRA under the SECURE Act, the Calandras recognized that CRT gifts funded with qualified retirement assets are a win-win for anyone who had previously planned to leave their unused retirement assets to children or other heirs with the expectation that they could “stretch” the distributions over their life. A testamentary CRT can preserve the retirement account “stretch” opportunity and provide lifetime income streams to beneficiaries.

When asked about their decision to make a CRT gift, Phil and Susan said, “The old adage that ‘you can’t have your cake and eat it too’ does not apply to making a planned gift to Notre Dame. Our CRT gifts have delivered, and will continue to do so long into the future, significant financial benefits to both the University and our family.

In addition, we have the pride and joy of knowing that in the future, our assets will be put to good use by the University to cure diseases and educate tomorrow’s leaders. We have concluded there is no better way to share our treasure.”

Thank you, Phil and Susan, for believing in the mission of Notre Dame and giving back to be a force for good in the world.
Student Impact

KATHERINE URASKY ’22
THOMAS G. AND GRACE GILLESPIE SCHOLARSHIP

As a high school student, Katherine Urasky was so focused on her career path after college, she did not fully appreciate that her college experience could be so much more than just a means to an end. Growing up in Indiana, Katherine knew about Notre Dame, but it was not high on the list of her college interests. That all changed after conversations with her theology teacher. It was through these discussions that Katherine realized what it meant to be a Notre Dame student and that her college education could be one of both personal growth and professional training which would help her to better serve others. She realized that she could not get this type of formative experience anywhere else. Katherine applied to Notre Dame and after receiving her acceptance, could not imagine herself at any other school.

However, as a first-generation college student, Katherine was not certain that she or her family would be able to afford a Notre Dame education. Coming from a devout family, her parents had already committed much of what they had saved towards Katherine’s and her siblings’ education at Catholic schools. Katherine was concerned that her dream of attending Our Lady’s University may not be possible. It was when Katherine was notified of a scholarship made possible by a planned gift to Notre Dame that her dreams became a reality.

Now a sophomore living in Ryan Hall, Katherine takes every chance available to deepen her Notre Dame experience. She serves as the dorm’s mental health commissioner, an advisor in Project Matriculate, and performs undergraduate research in biology. Her classes have also deepened her desire to serve others and grow as a person. While Katherine is still in the process of exploring which major (or majors) she will declare, she knows she has found a home forever at Notre Dame. Katherine is deeply grateful for the financial aid she has received through the Thomas G. and Grace Gillespie Scholarship and knows her personal formation was made possible through this planned gift.
Student Impact

EVAN SLATTERY ‘20
THOMAS G. AND GRACE GILLESPIE SCHOLARSHIP

Evan Slattery knew growing up in a middle class family with three sisters, his family was not in a position to pay for his education after high school and he would need financial aid to go to college. Evan was offered a full-ride scholarship to another university, which would have made things much easier for his family. Evan was content with accepting this full-ride scholarship until one evening when his aunt and uncle invited him over for dinner. At the dinner, Evan’s aunt and uncle spoke with him about the power of a Notre Dame education and encouraged Evan to consider applying to Our Lady’s University. They knew that an education at Notre Dame would offer so much more to Evan. After that dinner, Evan decided to apply and to his great delight, was accepted. However, it was the notification that he would receive the Gillespie Scholarship, funded through a planned gift, that made his final decision to attend Notre Dame possible.

Once on campus, Evan dove into academics and sports, joining the club rugby team and playing interhall football for his dorm, Morrissey Manor. Unfortunately, during his sophomore year, a hard rugby tackle left him with two herniated discs in his back that required surgery. When the pain returned post-surgery, Evan left school early during the fall semester of his junior year for a second surgery, casting doubt on whether Evan would be able to graduate on time. In the true spirit of Notre Dame, Evan’s Notre Dame community provided him the resources and support needed to make it possible to continue his studies and focus on his health. Just as the University had taken care of Evan in bringing him to campus, Notre Dame’s support did not waver in his time of need.

When Evan returned, he deepened his engagement with other areas of campus including coaching the interhall football team he once played on, joining the entrepreneurship club, and exploring how he could best apply the intellectual resources he was gaining to do good in the world. Evan is currently pursuing a variety of options post-graduation including graduate programs and positions at consulting firms. Evan is forever grateful for the opportunity provided to him to attend Notre Dame through the Thomas G. and Grace Gillespie Scholarship.
Student Impact

JINSU KIM ’21
HOWARD AND PATRICIA YORK SCHOLARSHIP

When Jinsu “Jin” Kim moved from Berlin, Germany, to New York City as a 7-year-old, he didn’t realize how the city would change his life. Captivated by the design of the high-rises and skyscrapers that surrounded him, Jin knew then and there that he wanted to be an architect. Throughout elementary and high school, Jin remained focused on this dream and ultimately set his sights on the University of Notre Dame.

Jin was drawn to Notre Dame over other architecture schools because of Notre Dame’s unique approach to classical architecture and the emphasis on hands-on, art-based learning. Jin knew he could go to a number of different schools and receive a good education, but in choosing Notre Dame Jin noted that “I would not get this education anywhere else.”

Jin was awarded the Howard and Patricia York Scholarship through the Notre Dame Club of Boston, a scholarship made through a planned gift. Now in his fourth year, Jin is extremely grateful for this scholarship. He explained that the Howard and Patricia York Scholarship helped ease the financial burden on his family, who has already sacrificed so much for his education. Jin has cherished his time at Notre Dame and said that the opportunity to be a Notre Dame student has allowed him to not only pursue his dream of becoming an architect, but also become a more well-rounded individual. Jin has been touched by the steadfast commitment of his fellow classmates to give back to society, helping to teach him the value of community and service toward the common good.

Jin is currently exploring his career options following his graduation in May of 2021. He is grateful to those who have enabled him to receive a transformative education at Notre Dame and wants planned gift benefactors to know the impact they make on students like himself.

Thank you for enabling students like Jin to pursue their dreams through a Notre Dame education.
Gift Options and Benefits

● **Bequest**
A gift made by naming Notre Dame in your will or testamentary trust or by naming Notre Dame as a beneficiary of your life insurance policy, bank account, or securities account.

**Life Income:** Not applicable  
**Minimum Gift:** Any amount

- Make a gift of any amount while retaining control of your assets during your lifetime
- May be modified at any point in time
- An outright gift from your estate is entirely free from federal taxes, permitting Notre Dame to utilize the full amount of your gift

● **Bequest of Retirement Assets**
By designating Notre Dame as a beneficiary of your retirement account, you may reduce or eliminate estate and/or income taxes at your passing. A bequest of your retirement account is one of the most tax-efficient ways to fund a charitable gift from your estate.

**Life Income:** Not Applicable  
**Minimum Gift:** Any Amount

- Avoid income and estate tax of your retirement account by naming Notre Dame as the beneficiary
- Change the beneficiary at your discretion
- Continue to receive retirement benefits during your lifetime

● **Charitable Gift Annuity**
A gift of cash or publicly traded securities made to Notre Dame, and in return, the University agrees to make fixed income payments to you and your spouse, or a designated beneficiary for life.

**Life Income:** Lifetime of fixed payments  
**Minimum Gift:** $20,000

- Receive guaranteed fixed payments for life, backed by the University’s full assets. Notre Dame holds a credit rating of “Aaa” from Moody’s Investor Service
- Income payments may be greater than many securities and CDs
- Ideal to supplement other retirement income
- Immediate income tax deduction for a portion of the gift

The University of Notre Dame is an educational institution and does not provide tax, legal, or financial advice. Any document or information shared by our staff is intended to be educational. Notre Dame strongly encourages all benefactors to seek counsel from their own legal and financial advisors. Please know that information or documents shared by Notre Dame cannot be used to avoid tax-related penalties.
Charitable Remainder Trust
A gift of cash or other assets to establish a charitable remainder trust which provides payments to you and your spouse or other named beneficiary while making a generous gift to Notre Dame. The payments may continue for the lifetimes of the beneficiaries you name, a fixed term of not more than 20 years, or a combination of the two.

**Life Income:** Lifetime or term of variable payments  **Minimum Gift:** $100,000

- Receive payments for life or for a term of years
- Leverage investment in the Notre Dame Endowment without incurring management fees
- Income payments may be greater than many securities and CDs
- Ideal to supplement other retirement income and diversify your portfolio
- Immediate income tax deduction for a portion of the gift

Charitable Rollover of Individual Retirement Accounts
If you are 70 ½ years of age or older, you can make an immediate impact at Notre Dame through an IRA Charitable Rollover gift. An IRA Charitable Rollover gift can be used to meet your annual required minimum IRA distribution and is excluded from your taxable gross income.

**Life Income:** Not Applicable  **Minimum Gift:** Any Amount

- Avoid income taxes on transfers of up to $100,000 from your IRA to Notre Dame
- Satisfy part or all of any required minimum distribution (RMD) for the year
- An easy and convenient way to make a gift from one of your major assets

Donor Advised Fund
A gift of cash or other property to establish a Notre Dame Donor Advised Fund, which allows you to support Notre Dame and other qualified charities.

**Life Income:** Not Applicable  **Minimum Gift:** $500,000

- Receive an immediate income tax deduction based on the fair market value of your gift, avoid capital gains tax on gifts of appreciated assets, and remove assets from your taxable estate
- Centralize the investment and administration of your gift assets
- No direct fund management or administrative fees
- Leverage the historic strength of the Notre Dame Endowment to aid other charities

Gift of Real Estate
You may deed part or all of your real estate property to Notre Dame.

**Life Income:** Not Applicable  **Minimum Gift:** Any Amount

- Avoid paying capital gains tax on the sale of the real estate
- Receive a charitable income tax deduction based on the value of the gift
Notre Dame Endowment Pool Performance

As of 6/30/19 • Annualized Returns

1 The Trust Universe Comparison Service (TUCS) Large Fund Median is a compilation of returns of endowment, pension, and foundation investors greater than $1 billion.

2 The 60% Equity / 40% Bond is an index blend of stocks / bonds as represented by the MSCI All Country World Investable Index and the Barclays Capital U.S. Aggregate Bond Index.

3 The Strategic Policy Portfolio is Notre Dame’s internal benchmark consisting of indices representative of the target investment portfolio.

Past performance is no guarantee of future results.
The chart evidences the long-term value differential for the endowment provided by the University’s investment management program compared to the value that would have been achieved had investment returns equaled those of the benchmarks shown in the previous chart.
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