



**BADIN  
GUILD**  
NOTRE DAME

# 2022 IMPACT REPORT



UNIVERSITY OF  
NOTRE DAME

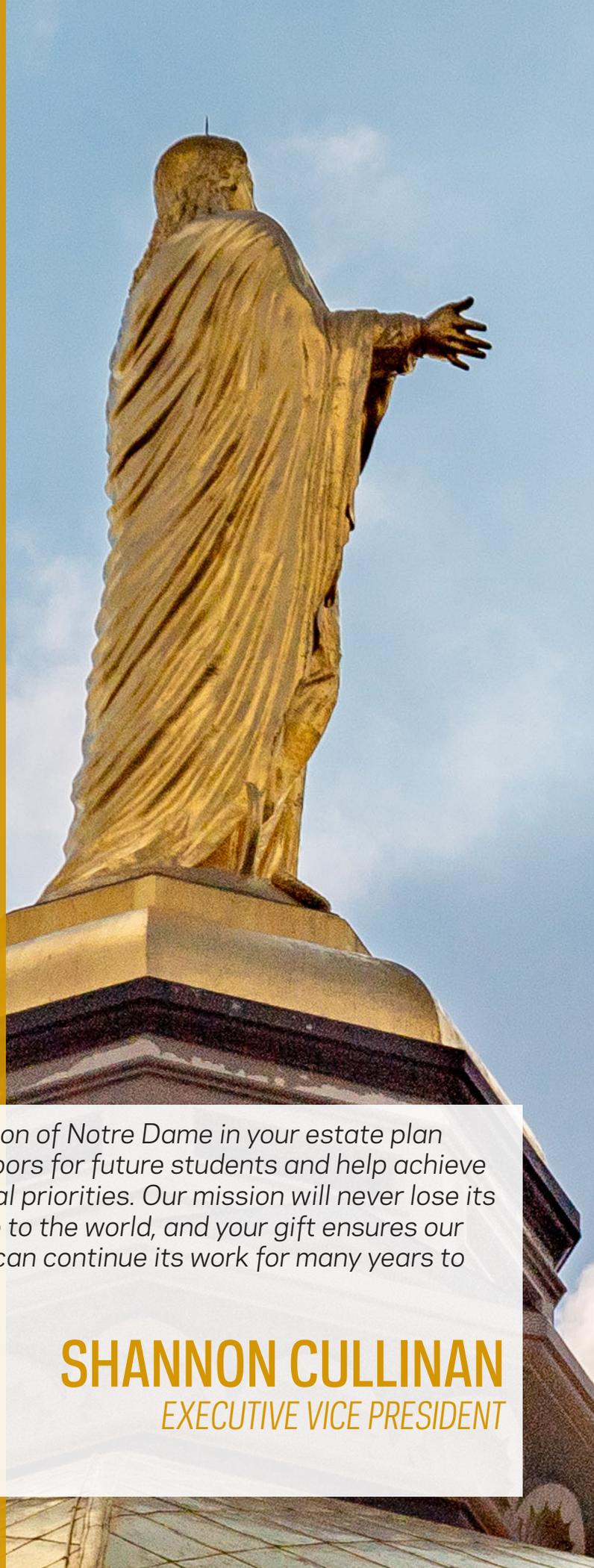
# BUILDING A MEANS FOR GOOD

This report illustrates the incredible generosity of members of Notre Dame's Badin Guild.

During fiscal year 2022, the University received 1,942 new planned gifts totalling more than \$348M, of which \$85M represented cash receipts.

In addition, more than \$49M of realized planned gifts was made available to the University.

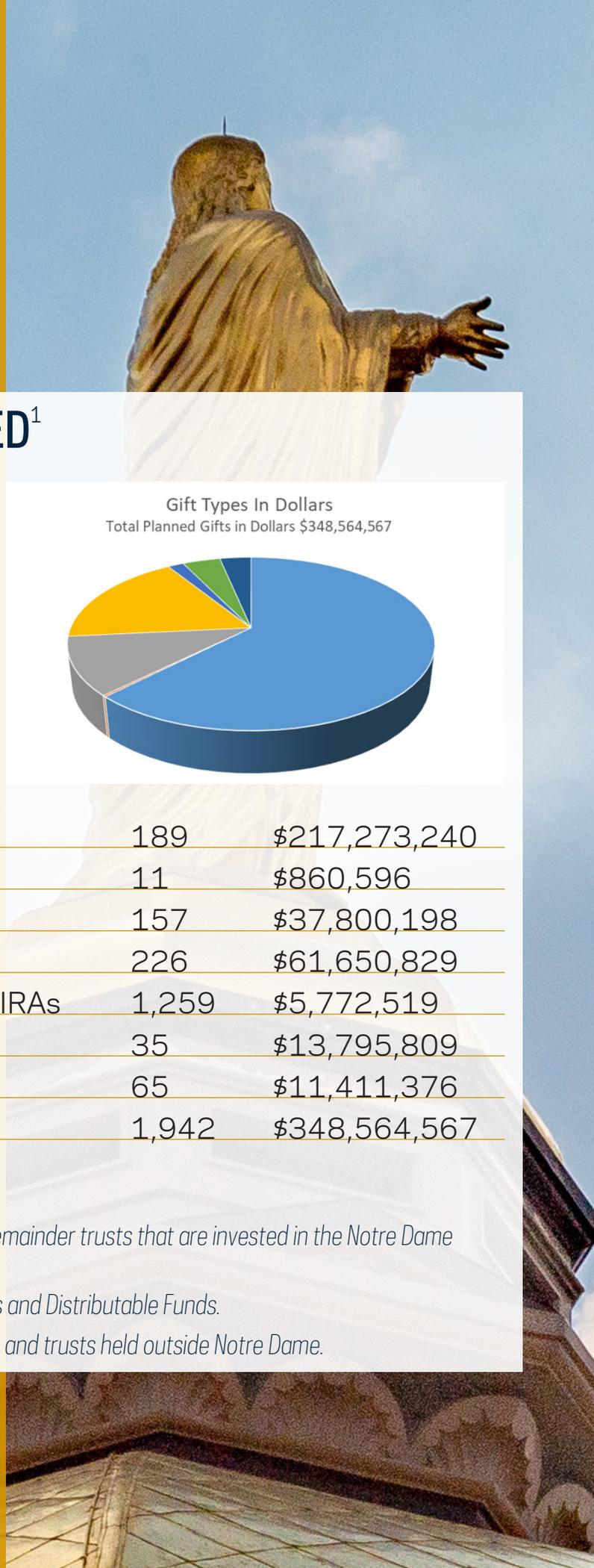
The generosity of Badin Guild members takes the form of various planned giving vehicles, including bequests, charitable remainder trusts, donor advised funds, and IRA distributions. In this report you will read testimonials from Badin Guild members and learn about the impact of these planned gifts.



*Your inclusion of Notre Dame in your estate plan will open doors for future students and help achieve other crucial priorities. Our mission will never lose its importance to the world, and your gift ensures our University can continue its work for many years to come.*

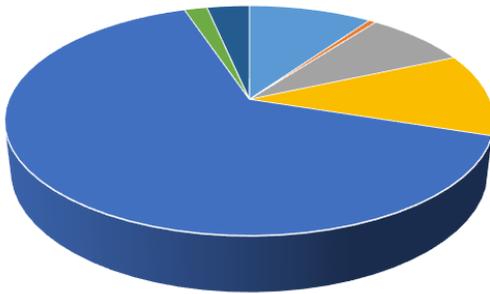
**SHANNON CULLINAN**  
EXECUTIVE VICE PRESIDENT

# FISCAL YEAR 2022

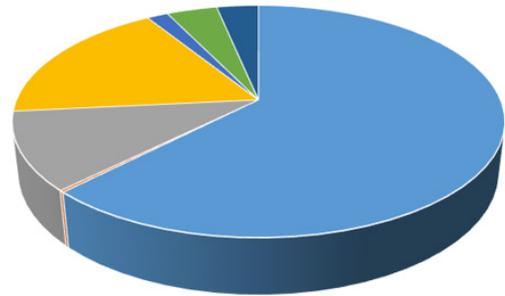


## NEW PLANNED GIFTS RECEIVED<sup>1</sup>

Number of Gifts By Type  
Total Number of Planned Gifts 1942



Gift Types In Dollars  
Total Planned Gifts in Dollars \$348,564,567



Bequests	189	\$217,273,240
Charitable Gift Annuities	11	\$860,596
Charitable Remainder Trusts <sup>2</sup>	157	\$37,800,198
Donor Advised Funds <sup>3</sup>	226	\$61,650,829
Qualified Charitable Distributions from IRAs	1,259	\$5,772,519
IRA Beneficiary Designations	35	\$13,795,809
Other <sup>4</sup>	65	\$11,411,376
<b>Total</b>	<b>1,942</b>	<b>\$348,564,567</b>

<sup>1</sup> Includes outright gifts, pledges, and deferred gifts.

<sup>2</sup> Represents gifts made to new and existing charitable remainder trusts that are invested in the Notre Dame Endowment.

<sup>3</sup> Includes all outright gifts and pledges to Retained Funds and Distributable Funds.

<sup>4</sup> Includes gifts in kind, life insurance, privately held stock, and trusts held outside Notre Dame.

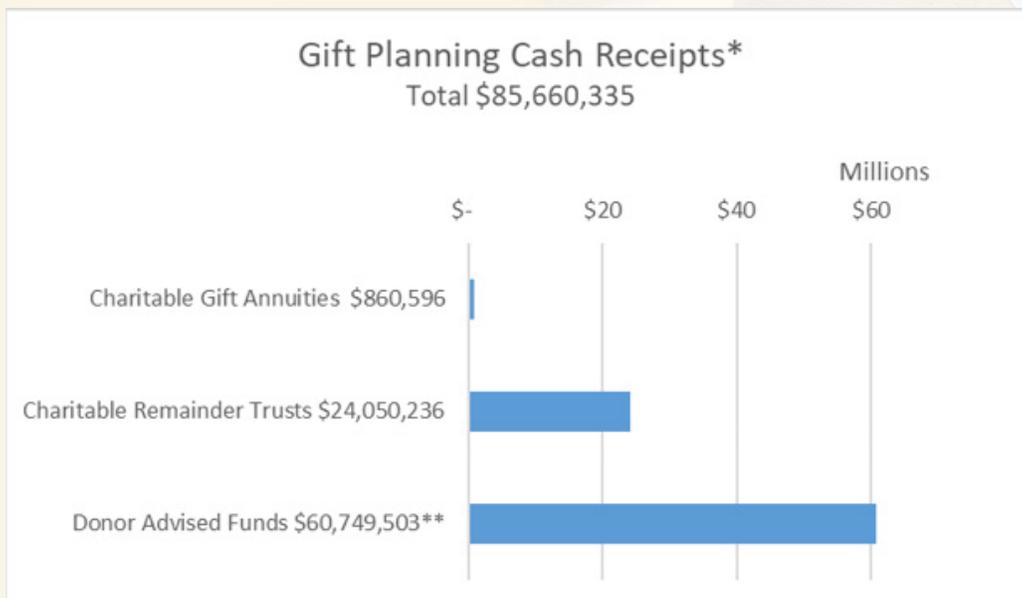
# REALIZED PLANNED GIFTS



\* Includes gifts in kind, life insurance, privately held stock, and trusts held outside Notre Dame.

In the same period, grants valued at \$44,397,867 were made to Notre Dame programs from donor advised funds at the University.

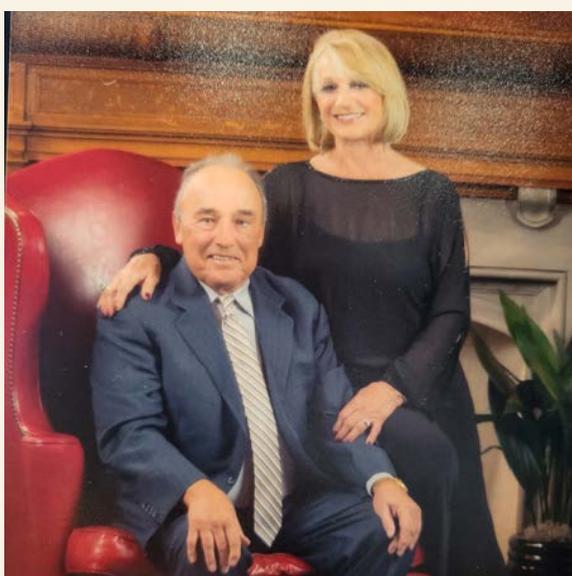
# GIFT PLANNING CASH RECEIPTS



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

\*\*Includes Retained Funds and Distributable Funds.

# THE IMPACT OF BEQUESTS



*Our three bequests will provide additional funds for our existing scholarships. This is a way to pay it forward and to honor my paternal grandparents who helped me pay for my Notre Dame education. My enormous appreciation for their generosity and the wonderful job the University is doing educating today's generation suggest we have made a wise investment.*

**DOMINICA & FRANK '61  
ANNESE**

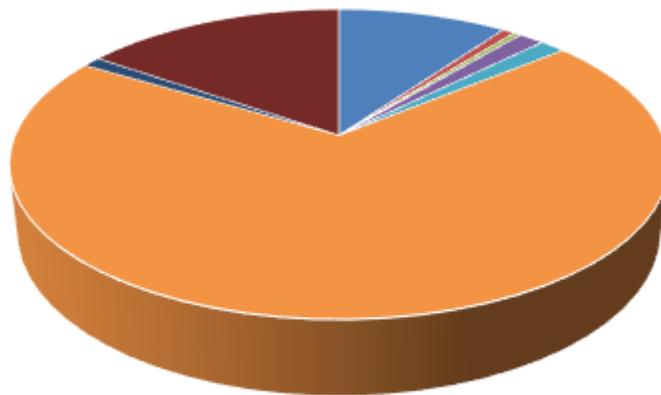


*I have often heard Notre Dame is family. It's true. A number of years after graduation I realized it was Notre Dame that instilled in me the values I hold dear. Assuming the role of family elders, we felt compelled to include the University in our estate plans to enable others to share in the wonderful experience of Notre Dame.*

**MARY & DENNIS '61  
WOLTER**

# REALIZED BEQUEST ALLOCATIONS

Realized Bequest Allocations  
Total \$20,756,897



- Academics & Student Life \$2,060,709
- Athletics \$150,000
- Catholic Mission \$86,974
- Graduate Programs \$312,711
- Research \$307,006
- Undergraduate Financial Aid \$14,427,498
- Undesignated \$218,024
- Unrestricted \$3,193,975

In fiscal year 2022, Notre Dame realized \$20,756,897 from bequests. Areas impacted by these gifts span a broad range of programs and purposes in categories such as Academics & Student Life, Athletics, Catholic Mission, Graduate Programs, Research, Undergraduate Financial Aid, Undesignated and Unrestricted—funding the University can allocate as needed—and beyond. In the same year, Notre Dame received 189 bequest intentions valued at \$217,273,240.



# THE IMPACT OF CHARITABLE REMAINDER TRUSTS



Barry and I established a CRT at the University because of our familial love for Notre Dame. While our gift provides us a quarterly stipend during our lifetime, our intent is for the invested principal to support the mission of the school in continuing to make the world a better place long after we are gone.

**JOAN DAUTREMONT-  
GLUCK '74 & BARRY GLUCK**



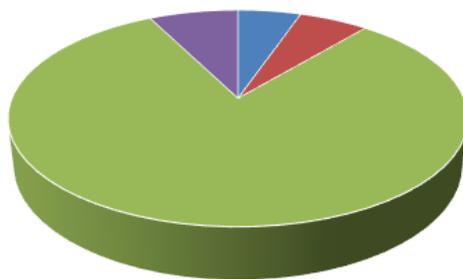
As a graduate of Notre Dame Law School, I wanted to leave a legacy gift to future generations of Notre Dame lawyers. The charitable remainder trust that Carol and I established provides a stream of income during our lifetime and the satisfaction of knowing that, upon our death, we will have enabled future generations to reap the remarkable benefits of a Notre Dame education.

**FRANK '82 & CAROL  
JULIAN**

# REALIZED CHARITABLE REMAINDER TRUST ALLOCATIONS

## Realized Charitable Remainder Trust Allocations

Total \$8,423,088



- Academics & Student Life \$444,985
- Research \$490,571
- Undergraduate Financial Aid \$6,857,811
- Unrestricted \$629,721

In fiscal year 2022, 157 gifts valued at \$37,800,198 were made to new and existing charitable remainder trusts, and \$8,423,088 was realized and allocated to Academics & Student Life, Research, Undergraduate Financial Aid, and Unrestricted funding.



# THE IMPACT OF DONOR ADVISED FUNDS



We feel fortunate to be able to participate in Notre Dame's premier investment returns through our donor advised fund. We use the DAF to support our Angelle Family Scholarship which assists first-generation Notre Dame undergraduate students, as well as local charities in our hometown of Houston.

**EVELYN (SMC '88) &  
FRANK '87 ANGELLE**



The Angelle Family Scholarship has helped me fulfill a life-long goal and dream. Your scholarship has allowed me to create relationships with people who will continue to shape who I am as a person for the rest of my life. As I continue past graduation, I will forever be grateful for what your gift has provided for me.

**SYDNI BROOKS '22**

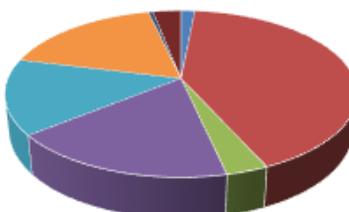
# DONOR ADVISED FUND GRANTS

## Donor Advised Fund Grants to Notre Dame Programs Total \$44,397,867



- Academics and Student Life \$27,937,592
- Athletics \$2,540,000
- Catholic Mission \$1,227,810
- Capital Projects \$1,950,000
- Financial Aid \$1,273,750
- Unrestricted \$9,468,715

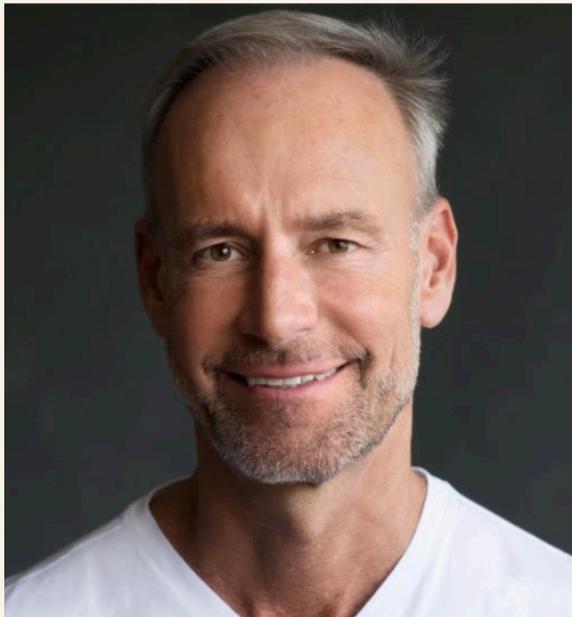
## Donor Advised Fund Grants to Other Qualified Charities Total \$10,427,776



- Arts and Culture \$157,000
- Education \$4,352,596
- Environment and Animals \$340,000
- Health \$1,847,500
- Human Services \$1,524,150
- Religion \$1,834,030
- International, Foreign Affairs \$50,000
- Public, Societal Benefit \$322,500

In fiscal year 2022, 226 gifts valued at \$61,650,829 were made to new and existing donor advised funds. During this same time period, benefactors recommended grants totaling \$44,397,867 to programs at the University and \$10,427,776 million to other qualified charities.

# THE IMPACT OF INDIVIDUAL RETIREMENT ACCOUNTS



*Notre Dame gave me an educational base and a community and set me up for success post-college. This experience, coupled with the example of my parents' hard-working entrepreneurial spirit, positioned me to attain many career opportunities. It also motivated me to assist others in obtaining the same transformational education that I was incredibly fortunate to receive. I have established a scholarship as well as a professorship in Entrepreneurial Studies in the Mendoza College of Business. To ensure future funding, I made commitments through both a bequest and an IRA beneficiary designation. It is my way of giving back for the incredible opportunity I was given.*

**BRAD KIME '82**

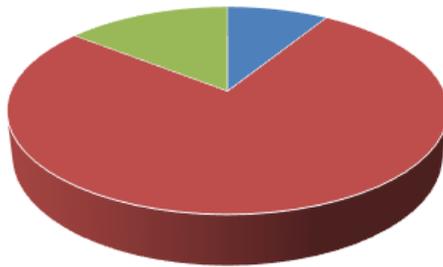


*I am so grateful for the Kime Family Scholarship, which has relieved much of the financial burden on me and my family. I am currently studying Computer Science with a minor in Latino Studies and studying abroad in Alcoy, Spain. None of this would have been possible without your support.*

**ASHLEY DURAN '23**

# REALIZED IRA DESIGNATIONS & QUALIFIED DISTRIBUTIONS

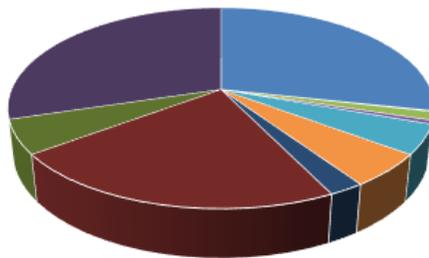
Realized IRA Beneficiary Designations  
Total \$1,323,652



- Academics & Student Life \$117,258
- Undergraduate Financial Aid \$1,015,621
- Unrestricted \$190,773

In fiscal year 2022, \$1,323,652 was realized from individual retirement accounts and allocated across Academics & Student Life, Undergraduate Financial Aid, and Unrestricted funds.

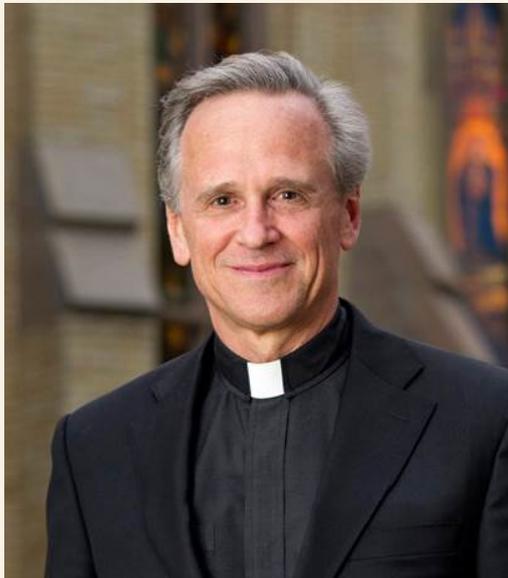
Qualified Charitable Distributions from IRAs  
Total \$7,978,847



- Academics & Student Life \$2,265,899
- Athletics \$11,650
- Capital Projects \$105,387
- Catholic Mission \$48,850
- Graduate Financial Aid \$375,700
- Other \$423,616
- Research \$180,659
- Undergraduate Financial Aid \$1,760,484
- Undesignated \$436,000
- Unrestricted \$2,370,602

During this same time period, Notre Dame received qualified charitable distributions from IRAs totaling \$7,978,847.

# THANK YOU



*Through your generous decision to designate a planned gift to Notre Dame, you make it possible for future generations to carry forward the University's critical work of scholarship, discovery, and service. I am profoundly grateful for your selfless dedication to the University and to advancing Notre Dame's mission to be a force for good in the world. Know that you and your loved ones are always in my prayers.*

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



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[giving.nd.edu/badin](https://giving.nd.edu/badin)



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