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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 Rev. Stephen Theodore Badin which led to the historic founding of the University of Notre Dame by Rev. Edward Sorin, C.S.C. in the year 1842.

Since that time, 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 Rev. 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 2020

Number of Gifts by Type

<table>
<thead>
<tr>
<th>Type</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td>Bequests</td>
<td>182</td>
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<tr>
<td>Charitable Gift Annuities</td>
<td>15</td>
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<tr>
<td>Charitable Remainder Trusts</td>
<td>164</td>
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<td>Donor Advised Funds</td>
<td>156</td>
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<tr>
<td>Individual Retirement Accounts</td>
<td>883</td>
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<td>Other</td>
<td>77</td>
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Dollars

<table>
<thead>
<tr>
<th>Type</th>
<th>Total</th>
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<tbody>
<tr>
<td>Bequests</td>
<td>$186,951,760</td>
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<tr>
<td>Charitable Gift Annuities</td>
<td>$1,705,749</td>
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<tr>
<td>Charitable Remainder Trusts</td>
<td>$24,820,939</td>
</tr>
<tr>
<td>Donor Advised Funds</td>
<td>$155,665,807</td>
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<tr>
<td>Individual Retirement Accounts</td>
<td>$18,313,897</td>
</tr>
<tr>
<td>Other</td>
<td>$7,920,367</td>
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</table>

1 Includes outright gifts, pledges, and deferred gifts.
2 Represents gifts made to new and existing charitable remainder trusts that are invested in the Notre Dame Endowment.
3 Includes all outright gifts and pledges to Retained Funds and Distributable Funds.
4 Includes gifts in kind, life insurance, privately held stock, and trusts held outside Notre Dame.
Total Planned Gifts Invested in the Notre Dame Endowment

**AS OF JUNE 30, 2020**

<table>
<thead>
<tr>
<th>Type of Planned Gift</th>
<th>Assets Under Management</th>
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</thead>
<tbody>
<tr>
<td><strong>Charitable Gift Annuities</strong></td>
<td>$28,278,743</td>
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<tr>
<td><strong>Charitable Remainder Trusts</strong></td>
<td>$272,647,632</td>
</tr>
<tr>
<td><strong>Donor Advised Funds</strong></td>
<td>$258,800,391</td>
</tr>
</tbody>
</table>

- **880** Gift Instruments
- **$559,726,766** Total Assets Under Management
Realized Planned Gifts

Fiscal Year 2020

- **$12,495,614**
  - Bequests

- **$579,154**
  - Charitable Gift Annuities

- **$653,074**
  - Charitable Remainder Trusts

- **$5,062,729**
  - Individual Retirement Accounts - Living Distributions

- **$1,595,655**
  - Individual Retirement Accounts - Death Benefits

- **$9,316,886***
  - Other

- **$29,703,112**
  - Total FY20 Realized Gifts

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

**Fiscal Year 2020**

$2,208,997
Charitable Gift Annuities

$24,720,938
Charitable Remainder Trusts

$144,617,170**
Donor Advised Funds

$171,547,105
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 FY20 Notre Dame realized $12,495,614 from bequests. These gifts were allocated across Academics and Student Life, Catholic Mission, Undergraduate Financial Aid, Undesignated, and Unrestricted funding that the University can allocate as needed. In the same year, Notre Dame received 182 Bequest intentions valued at $186,951,760.
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. The University’s financial health is rated “Aaa” by the independent rating service Moody’s Investor Service. This is Moody’s highest long-term credit rating.

As of June 30, 2020, Notre Dame had 145 charitable gift annuities under management with a total value of $28,278,743. In FY20, 15 charitable gift annuities valued in total at $1,705,749 were received as gifts, and $579,154 was realized and allocated across 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, 2020, Notre Dame had 604 charitable remainder trusts under management with a total value of $272,647,632. In FY20, 164 gifts valued at $24,820,939 were made to new and existing charitable remainder trusts. During this same time, $653,074 was realized from charitable remainder trusts and allocated to Undergraduate Financial Aid.

*Past performance does not guarantee future results.
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 grants to other qualified charitable organizations, based on your recommendations.

As of June 30, 2020, Notre Dame had 131 donor advised funds under management with a market value of $258,800,391 split between the Retained Funds and Distributable Funds. Over $102 million of this total was in Retained Funds which ultimately benefits Notre Dame.

Twenty-nine DAFs valued at $110,764,206 were created in FY20. Benefactors recommended grants totaling over $20 million to programs at the University and over $14 million to other qualified charities during this time period.

Donor Advised Fund Grants to Notre Dame Programs

FISCAL YEAR 2020

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academics &amp; Student Life</td>
<td>$11,978,976</td>
</tr>
<tr>
<td>Athletics</td>
<td>$475,000</td>
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<tr>
<td>Capital Projects</td>
<td>$1,791,573</td>
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<tr>
<td>Catholic Mission</td>
<td>$175,000</td>
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<tr>
<td>Financial Aid</td>
<td>$4,054,446</td>
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<tr>
<td>Unrestricted</td>
<td>$1,974,218</td>
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</table>

$20,449,213
Total Donor Advised Fund Grants to Notre Dame Programs
Donor Advised Fund Grants to Other Qualified Charities*

FISCAL YEAR 2020

$14,329,530
Total Donor Advised Fund Grants to Other Qualified Charities

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
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<tr>
<td>Education</td>
<td>$7,483,883</td>
</tr>
<tr>
<td>Arts &amp; Culture</td>
<td>$5,000</td>
</tr>
<tr>
<td>Environment &amp; Animals</td>
<td>$10,000</td>
</tr>
<tr>
<td>Health</td>
<td>$470,000</td>
</tr>
<tr>
<td>Human Services</td>
<td>$5,127,814</td>
</tr>
<tr>
<td>Religion</td>
<td>$1,232,833</td>
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</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 your gift.
- Your gift must be outright.

**Realized IRA Living Distributions**

**FISCAL YEAR 2020**

- **Total Realized IRA Allocations from Living Distributions:** $5,062,729
- **56 gifts**

Academics & Student Life: $1,582,797

Capital Projects: $111,792

Catholic Mission: $6,000

Graduate Financial Aid: $189,570

Other: $292,854

Research: $145,730

Undergraduate Financial Aid: $1,166,691

Undesignated: $150,000

Unrestricted: $1,417,295
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 be upwards of 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.

In FY20, $1,595,655 were realized from three retirement accounts all of which were allocated to Academics and Student Life.
Impact Stories
OFFICE OF GIFT PLANNING
Benefactor Impact

JOHN ZIPPRICH ’70, ’72 LAW

As a beneficiary of a scholarship established through an estate provision, John Zipprich is paying it forward with his own plans for Notre Dame.

Graduating at the top of his class from a public high school in a small town in Texas, John’s goal was to attend a school that nurtured his Catholicism in tandem with his pursuit of educational excellence. Although John was accepted to Notre Dame, his family was not in a position financially to afford all the cost. As providence would have it, John was awarded a four-year scholarship made possible by an estate gift to Notre Dame. The scholarship assistance he received made John’s dream of earning a Notre Dame education a reality.

In John’s first year at Notre Dame, he was welcomed to a campus that received 113 inches of snow that season in addition to the normal challenges in the adjustment to student life at Notre Dame. But the path for his life became far clearer that year when, after working in a chemical research lab during the first college summer, he decided to leave behind his plan to pursue Chemical Engineering in favor of courses in arts and letters and business.

As a student, John realized he had a passion for serving the public interest and promoting social justice. In pursuing this passion, John was able to enter Notre Dame’s Law School at the end of his junior year, where he hoped to acquire the skills to make a lasting difference in the lives of many. John graduated from the Notre Dame Law School in 1972 and was also awarded a Bachelor of Arts degree at Notre Dame.

Following graduation, John worked for a major Houston law firm, fulfilled his Vietnam era ROTC obligation, and then became General Counsel of the Sisters of Charity of the Incarnate Word of Houston, Texas. Throughout much of his career, John served as Senior Vice President and General Counsel of CHRISTUS Health, an international, Catholic healthcare organization that then was a ministry of the Sisters of Charity of the Incarnate Word of Houston, the Sisters of Charity of the Incarnate Word of San Antonio, and now includes the Sisters of the Holy Family of Nazareth. While in leadership at CHRISTUS Health, John also served as Presidente of both the hospital system Grupo CHRISTUS Muguerza and its clinic program for the underserved, Servicios Comunitarios Adelaida Lafon de Muguerza.
Throughout his career, John worked to strengthen the health and enhance the dignity of persons through these organizations. He continues serving as Board Chair of Sisters of Charity of the Incarnate Word, Houston, Texas, the original Sisters’ entity where he was first employed. He is also on the Board and Secretary of Medical Bridges, whose mission is to bridge the healthcare gap worldwide by procuring and distributing medical equipment and supplies to underserved communities primarily in the developing world.

Knowing the role that the Sisters has played in his life and the education made possible by the gift of the estate based scholarship he received at Notre Dame, John wanted to give the students of tomorrow the same opportunities he had. To that end, John has created both a charitable remainder trust at Notre Dame as well as designated a significant part of his estate to the University. These gifts will provide scholarship assistance in perpetuity to undergraduate students as well as assisting recent graduates of the Notre Dame Law School to pursue jobs within not-for-profit organizations, including religiously affiliated organizations. In addition to his planned gifts, John’s annual contributions to Notre Dame span more than forty-five years and include support of the Order of St. Thomas More, an annual giving society that helps educate the next generation of Notre Dame lawyers.

John’s philanthropy to Notre Dame reflects the invaluable difference the University of Notre Dame, the Notre Dame Law School, and his scholarship has made—not only in his life but also through his professional career.

Thank you, John, for using your talents to be a force for good in the world and for your trust in Notre Dame to continue to educate the next generation of those who are charged with the same mission.
Student Impact

AGGIE LABOE ’21

JOHN A. AND JOY M. TESKE SCHOLARSHIP

Aggie, the daughter of Mark ’89 and Paula Laboe, grew up in Chicago, just a short drive away from Notre Dame. Aggie always dreamed of attending Notre Dame, but she knew that even if she were accepted, her family would not be able to afford the cost of tuition. She applied anyway. In addition to an acceptance letter from her dream school, Aggie received the news that she would be receiving financial aid, made possible by a scholarship funded through a charitable remainder trust established by Badin Guild members John A. Teske ’48, ’49 MS, and his wife Joy.

When asked about the opportunity made possible through this scholarship, Aggie stated, “I always wanted to go to Notre Dame growing up but did not think it could ever be a financial reality for my family. In this way, financial aid made it wholly possible to attend my dream school.”

In pursuing her psychology degree, Aggie discovered her love of research when she began working in Dr. Cindy Bergeman’s Adult Development & Aging Lab her freshman year. Through this experience, Aggie has cultivated an interest in the prevention and treatment of eating disorders. Applying the skills she is acquiring to the greater campus community, Aggie serves as the president of the Health and Fitness Club and facilitates weekly groups on body positivity. In addition, Aggie is currently completing her Senior Honors Thesis on the mother-daughter relationship on body image and eating attitudes.
In her spare time, Aggie is also involved with the Center for Social Concerns, participating in various seminars and immersions. Starting this year, she is engaging further in the community as a recipient of the McNeill Fellowship. Through this fellowship, Aggie is interning at a nonprofit organization called Mental Health Awareness of Michiana, assisting with the development and implementation of a pro-bono counseling initiative and running a social media campaign on eating disorders and racial disparities.

Aggie is profoundly grateful to Notre Dame and the Teske family for providing her with the time, space, and resources to acquire the skills necessary to be a force for good in the world; it has undoubtedly been an incredibly formative four years. "I cannot say thank you enough. My time at Notre Dame has been enriching and formative and eye-opening, so to you, I am forever indebted!"
Student Impact

SEUNG WOO (SEAN) LEE ‘22
CHARLES S. CURRAN SCHOLARSHIP

Born in Seoul, South Korea, Sean moved with his family to the United States as a young child. When it was time to consider colleges, Sean’s parents, with their experience of the wider world, encouraged him early on to broaden his experiences by looking for schools outside his home state of Alabama. As Sean began looking at different Ivy League schools, his mother, a devout Catholic, recommended he consider Notre Dame.

While Notre Dame was highly ranked and reputable, the cost of the tuition was daunting. With Sean’s brother already two years into his studies at Texas A&M, the family’s finances were not going to cover the cost of a private, out-of-state school for Sean. However, the financial aid package offered by Notre Dame made Sean’s decision to attend Our Lady’s University much easier.

As a computer science major, part of Sean’s financial aid came from the Charles S. Curran Scholarship, which provides need-based support with preference being given to students who are majoring in computer or engineering science. This planned gift scholarship was made possible through a charitable remainder trust that Charles S. Curran ’40 made established his lifetime.

In addition to his studies, Sean has enjoyed football games, a culturally diverse study abroad experience in Spain, Alumni Hall events, and involvement in the Korean Student Association. When asked about his experience at the University, Sean said it has been enriched by the Notre Dame family, a close community that accepts all kinds of students and reaches out to help those in need. Notre Dame has also taught Sean that it is up to him to recognize and act upon opportunities or they may pass him by.

Sean would like our benefactors to know how much he appreciates being a Notre Dame student. “Thank you for giving me the opportunity to experience all that Notre Dame has to offer. While I could have had many of these experiences at a different college, the opportunity to study at Notre Dame has made my college years unique and incomparable.”
Planned Gifts
at Notre Dame
OFFICE OF GIFT PLANNING
Gift Options and Benefits

Estate Gifts
A gift made by naming Notre Dame in your Will or Living 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

- Direct a gift of any amount while retaining full control of your assets during your lifetime;
- Retain the flexibility to modify your intended gift at any point in time; and
- Create an outright gift from your estate that 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 part or all 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; and
- Continue to receive retirement benefits during your lifetime.

Charitable Gift Annuity
A charitable gift annuity is a gift of cash or other assets to Notre Dame, and in return, the University agrees to make fixed income payments to you and your spouse and/or designated beneficiary for life.

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

- A lifetime of fixed payments backed by the University’s full assets. Thanks to prudent financial management, 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; and
- An immediate income tax deduction for a portion of the gift.

Charitable Remainder Trust
A charitable remainder trust is a gift of cash or other assets to establish a charitable remainder trust which provides payments to you and your spouse, and/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

- The potential for significant growth of the trust, as the Notre Dame Endowment has for decades been one of the best-performing endowments in higher education, routinely outperforming its peers and the major market indices, without any direct administrative fees.
- An income stream based on the value of the trust’s assets, which has the potential to significantly increase as the trust grows in value;
- Ideal to supplement other retirement income and diversify your portfolio; and
- Immediate income tax deduction for a portion of the gift.
Charitable Rollover of Individual Retirement Accounts
If you are 70 1/2 years of age or older and have a traditional IRA, you can make an immediate impact at Notre Dame through an IRA Charitable Rollover gift. An IRA Charitable Rollover gift, also known as a qualified charitable distribution (QCD), allows you to make a gift directly from your IRA to Notre Dame, satisfy part or all of your annual required minimum distribution (RMD), and exclude part or all of that distribution from your federal taxable gross income, thereby reducing your tax liability.

**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 RMD for the year; and
- 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;
- Enjoy centralized administration of your gift assets and benefit from the expert investment management of the Notre Dame Endowment, all with no direct investment or administrative fees;
- Make a significant impact at Notre Dame and advise the University on distributions to other qualified charities on your timetable; and
- As donor advised funds do not require public disclosure of charitable gifts, the Notre Dame Donor Advised Fund offers privacy and the flexibility to make anonymous distributions, if desired.

Gift of Real Estate
By making an irrevocable gift of real estate during your life with a retained life estate, you can continue to live in and use your property during your lifetime. Real Estate can be an attractive way to make a large charitable gift to Notre Dame because the gift can be structured so you may continue to enjoy your property during your lifetime. Notre Dame will then receive the property at your death as the remainder beneficiary. Additionally, you may be able to take a charitable income tax deduction for the current taxable year.

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

- Continue to live in and use your property during your lifetime through a retained life estate;
- Avoid paying capital gains tax on the sale of appreciated real estate; and
- Receive a charitable income tax deduction based on the value of the gift.
The Trust Universe Comparison Service (TUCS) Large Fund Median is a compilation of returns of endowment, pension, and foundation investors greater than $1 billion.

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.

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 Pool 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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