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
New Planned Gifts Received

Number of Gifts by Type

<table>
<thead>
<tr>
<th>Type</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bequests</td>
<td>180</td>
</tr>
<tr>
<td>Charitable Gift Annuities</td>
<td>3</td>
</tr>
<tr>
<td>Charitable Remainder Trusts</td>
<td>148</td>
</tr>
<tr>
<td>Donor Advised Funds</td>
<td>201</td>
</tr>
<tr>
<td>Qualified Charitable Distributions from IRAs</td>
<td>1530</td>
</tr>
<tr>
<td>IRA Beneficiary Designations</td>
<td>31</td>
</tr>
<tr>
<td>Other</td>
<td>97</td>
</tr>
</tbody>
</table>

Total: 2,190

New Planned Gifts Received

Gift Types in Dollars

<table>
<thead>
<tr>
<th>Type</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bequests</td>
<td>$491,847,148</td>
</tr>
<tr>
<td>Charitable Gift Annuities</td>
<td>$174,876</td>
</tr>
<tr>
<td>Charitable Remainder Trusts</td>
<td>$42,557,949</td>
</tr>
<tr>
<td>Donor Advised Funds</td>
<td>$82,273,403</td>
</tr>
<tr>
<td>Qualified Charitable Distributions from IRAs</td>
<td>6,256,059</td>
</tr>
<tr>
<td>IRA Beneficiary Designations</td>
<td>$12,906,839</td>
</tr>
<tr>
<td>Other</td>
<td>$9,455,166</td>
</tr>
</tbody>
</table>

Total: $645,471,440

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bequests</td>
<td>$23,079,120</td>
</tr>
<tr>
<td>Charitable Gift Annuities</td>
<td>$7,227,040</td>
</tr>
<tr>
<td>Charitable Remainder Trusts</td>
<td>$5,260,718</td>
</tr>
<tr>
<td>Qualified Charitable Distributions from IRAs</td>
<td>$8,710,144</td>
</tr>
<tr>
<td>IRA Beneficiary Designations</td>
<td>$4,175,768</td>
</tr>
<tr>
<td>Other</td>
<td>$9,796,299</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charitable Gift Annuities</td>
<td>$174,876</td>
</tr>
<tr>
<td>Charitable Remainder Trusts</td>
<td>$38,757,949</td>
</tr>
<tr>
<td>Donor Advised Funds</td>
<td>$81,760,475</td>
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</tbody>
</table>

Total $120,693,300

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.
“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

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academics &amp; Student Life</td>
<td>$9,924,256</td>
</tr>
<tr>
<td>Athletics</td>
<td>$600,286</td>
</tr>
<tr>
<td>Catholic Mission</td>
<td>$25,500</td>
</tr>
<tr>
<td>Undergraduate Financial Aid</td>
<td>$4,050,104</td>
</tr>
<tr>
<td>Undesignated</td>
<td>$25,001</td>
</tr>
<tr>
<td>Unrestricted</td>
<td>$8,453,972</td>
</tr>
</tbody>
</table>

Total $23,079,119

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catholic Mission</td>
<td>$3,148,592</td>
</tr>
<tr>
<td>Undergraduate Financial Aid</td>
<td>$1,807,447</td>
</tr>
<tr>
<td>Unrestricted</td>
<td>$3,138,412</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$5,260,718</strong></td>
</tr>
</tbody>
</table>

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
"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
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.
“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
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

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www.giving.nd.edu/badin