



Love Thee  
Notre Dame

TODAY | TOMORROW | FOREVER



# Estate Gifts

CREATE YOUR LEGACY AT NOTRE DAME



UNIVERSITY OF  
NOTRE DAME

574.631.7164 [pgiving@nd.edu](mailto:pgiving@nd.edu) [plannedgiving.nd.edu](http://plannedgiving.nd.edu)



## ESTATE GIFTS AT THE UNIVERSITY OF NOTRE DAME

### **Your Legacy: Empowering Future Generations to be a Force for Good in the World**

Notre Dame has been shaped in powerful ways by estate gifts both large and small. From scholarships, to academic and service programs, to landmark campus buildings, the impact of estate gifts by generous benefactors has been central to furthering Notre Dame's mission.

An estate gift is quite often the most straightforward way for members of the Notre Dame family to realize their charitable goals at Notre Dame and typically provides an avenue for alumni, parents, and friends to impact Notre Dame beyond what would be possible during their lifetimes.

Though these gifts can be modified at any time, sharing one's estate gift intentions allows Notre Dame to confidently plan for the future and paves the way for benefactors to dedicate the use of their estate gifts either for Notre Dame's areas of greatest need or for a particular cause or purpose.

## ATTRACTIVE BENEFITS OF AN ESTATE GIFT

- 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.
- Create an outright gift from your estate entirely free from federal estate taxes, permitting Notre Dame to utilize the full amount of your gift. In contrast, estate gifts made to individuals may be subject to taxation.
- Enjoy the satisfaction of creating a legacy and having a lasting impact on the world's premier Catholic university.
- Become a member of the Stephen Theodore Badin Guild, a giving society established to honor those who make Notre Dame a part of their personal legacy by creating a planned gift. Contact us at [pgiving@nd.edu](mailto:pgiving@nd.edu) to learn more about qualifying for membership in the Badin Guild and the special member experiences.

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For more information, please contact us at **(574) 631-7164** or [pgiving@nd.edu](mailto:pgiving@nd.edu).

## MAKING AN ESTATE GIFT IS SIMPLE

There are many creative ways to structure your estate plan that may allow you to make a gift to Notre Dame while also providing for your loved ones. In many cases, an estate gift may provide you with the opportunity to make a more significant gift than might have been possible in the present.

With the guidance of an advisor, an estate gift to Notre Dame can be accomplished through a variety of means by:

- Including a gift of a specific dollar amount or percentage of your estate to Notre Dame.
- Designating Notre Dame as the beneficiary of a retirement account or life insurance policy.
- Providing for a gift of cash, securities, real estate, or other property.
- Directing the balance or residue of your estate to Notre Dame.

You may wish to specify that your estate gift benefit a particular area of the University or leave your gift unrestricted to allow Notre Dame to apply your gift where it will do the most good.

Leaving your estate gift unrestricted is an especially generous act, as it acknowledges that funding priorities evolve over time and demonstrates your trust in the University to steward your gift in a manner that honors your legacy.

## DIRECTING YOUR ESTATE GIFT

Each year, the University relies on estate and other planned gifts to meet funding needs, provide financial aid to students, and establish new programs and strengthen existing ones. Estate gifts of any size have an immense impact on Notre Dame and the students under its care. All estate gifts are deeply appreciated and will make a lasting impact on Notre Dame.

Estate gifts to endowed funds create a special legacy and will benefit future generations of Notre Dame students. Scholarships are a perennial need. Subject to certain minimum amounts, your gift may establish a permanently endowed scholarship in your name, benefiting Notre Dame students in perpetuity.

### **Jeannette and Charles Cancillieri Scholarship**

Jeannette and Charles Cancillieri both received masters degrees from Notre Dame in 1971, and made annual gifts to the Notre Dame Fund for over 25 years. Charles passed away in 1998, and Jeanette continued to make gifts to the Notre Dame fund until her passing in 2009. Upon Jeannette's passing, a bequest from her estate established the Jeannette and Charles Cancillieri Scholarship which provides need-based scholarships to deserving undergraduate students. Invested in the Notre Dame Endowment, as of June 30, 2019, this estate gift has nearly doubled in market value while distributing over \$460,000 to 17 students at Notre Dame and will continue to make the dream of a Notre Dame education real for many students in perpetuity.



## DISCUSSING YOUR ESTATE GIFT WITH A GIFT PLANNER

To ensure that your wishes are carried out exactly as you intend, it is important for you to discuss your estate gift with a Notre Dame Gift Planning Officer. Our staff of experts would be honored to work with you and your advisors in creating a plan that fulfills your personal intentions and objectives.

Our Gift Planning Officers are well versed in the tax implications of planned gifts and can assist you in creating an estate gift that maximizes the impact of your gift and the tax advantages available to you and your loved ones. While estate gifts to Notre Dame are free from federal estate tax, by carefully structuring your gift, there may be ways to avoid or reduce certain other taxes.

Finally, from time to time, Notre Dame receives estate gifts without having any advance notice of the gift. While such gifts are greatly appreciated, informing our staff of your estate gift intention provides Notre Dame the opportunity to make the most impactful use of your gift and allows Notre Dame to appropriately honor and express our gratitude for your generosity.



*Since Her earliest days,* planned gifts have sustained the life and work of Our Lady's University. The Love Thee Notre Dame initiative is an invitation to all members of the Notre Dame family to help secure Notre Dame's future through planned giving commitments and ensure that the University's sacred mission will live on—**today, tomorrow, and forever.**

Notre Dame is an educational institution and does not provide tax, legal, or financial advice. Any document or information provided to you by our staff is intended to be educational and informational. Notre Dame strongly encourages all of our donors to seek counsel from their own legal and financial advisors. Please know that any information or document shared by the development staff cannot be used to avoid tax-related penalties. Actual year-to-year performance of the Notre Dame Endowment varies, and past performance does not guarantee future results.

