



# Estate Gifts

**BUILD YOUR LEGACY AT NOTRE DAME**

574.631.5177   [pgiving@nd.edu](mailto:pgiving@nd.edu)   [plannedgiving.nd.edu](http://plannedgiving.nd.edu)

## ESTATE GIFTS

# Empowering Future Generations

An estate gift is quite often the most straightforward way for members of the Notre Dame family to realize their charitable goals and can provide an avenue for alumni, parents, and friends to impact Notre Dame beyond what would be possible during their lifetimes. Sharing one's estate gift intentions allows Notre Dame to confidently plan for the future.

## Noteworthy Benefits

- 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 a gift free from federal estate or income taxes, allowing Notre Dame to utilize the full amount of your gift.
- Enjoy the satisfaction of creating or expanding a legacy that will have a lasting impact on not only Our Lady's University, but the world.

## How It Works

There are many creative ways to structure your estate plan that will allow you to provide for your loved ones while also making a gift to Notre Dame.

An estate gift to Notre Dame can be accomplished through the following means:

- Include a charitable provision in your will or revocable trust, which is the most common way to make an estate gift.
- Name Notre Dame as a beneficiary of your retirement account. This can be one of the simplest and most tax-efficient strategies available.
- Designate the University of Notre Dame as a partial or full beneficiary of your life insurance policy.

**"An estate gift is the last time you get to say what your life was about."**

**KENN RICCI**



### Did You Know?

Gifts made to Notre Dame through your estate or to a Notre Dame charitable remainder trust or donor advised fund are just a few ways to qualify for membership in the Badin Guild, the recognition society for planned gifts. Members of the Badin Guild have access to exclusive events as well as unique opportunities to engage with the campus community.

# Types of Bequests

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## DETERMINING THE STRUCTURE OF THE BEQUEST

- **A percentage of your estate** can be designated to Notre Dame, ensuring your gift remains in proportion to all other aspects of your total estate.
- **Residuary bequests** are used to give Notre Dame all or a portion of your estate that remains after payment of expenses and specific amounts designated to other beneficiaries.
- **Specific bequests** are used to make a gift of a specific dollar amount or specific asset(s) (such as real estate or personal property) to Notre Dame.

For examples of bequest language you can provide to your attorney, scan code at right. >>



## UNRESTRICTED VS. RESTRICTED BEQUESTS: DESIGNATING THE PURPOSE OF THE BEQUEST

- **Unrestricted bequests** do not include a specific designation and therefore allow Our Lady's University the benefit of allocating your generous gift to the areas of greatest need.
- **Restricted bequests** include a specific designation to support a particular program or purpose that reflects your personal or professional philanthropic interest (e.g., scholarships, faculty research, or student activities).

## Making a Plan

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If you are considering making or have already made provisions for Notre Dame in your estate, please contact a member of our gift planning team to discuss your intentions. Doing so can open the door to several important conversations:

- **First**, our staff of gift planning experts can provide guidance to you and your attorney in drafting language that will ensure that your gift is used as you intend.
- **Second**, our gift planners can assist you in creating a bequest that maximizes the tax advantages available to you and your heirs.
- **Finally**, informing Notre Dame of your intentions allows us to express our deep gratitude for your generosity and commitment to the mission of Our Lady's University.

## Impact Story

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Jeannette and Charles Cancillieri both received master's 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 Jeannette 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, 2022, this estate gift has nearly doubled in market value while distributing over \$637,306 to students at Notre Dame and will continue to make the dream of a Notre Dame education real for many students in perpetuity.





# Love Thee Notre Dame

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For more information, please contact us  
at **(574) 631-5177** or **[pgiving@nd.edu](mailto:pgiving@nd.edu)**.