Bequests, or gifts made through an individual’s estate, have helped shape Notre Dame as “one of the most powerful means for doing good” since Rev. Edward Sorin, C.S.C., declared he would establish a university from land gifted to Notre Dame. Campus landmarks ranging from the Coleman Morse Center and the Eck Hall of Law to the DeBartolo Performing Arts Center and the Guglielmino Family Athletics Center were all funded through bequests. So, too, were many of the scholarships and endowed professorships that are central to the education of our students’ minds and spirit.

Let us help you realize your Notre Dame legacy. Learn how to name Notre Dame as a beneficiary of your will or revocable trust, find out how retirement plans make the most tax-efficient bequest to charity, and be inspired by the stories of some of these impactful gifts.

**Types of Bequests**

**Residuary vs. Specific Bequests: Designating the Amount of the Bequest**

- **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 securities, real estate, or personal property) to Notre Dame.

**Restricted vs. Unrestricted Bequests: Designating the Purpose of the Bequest**

- **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).
- **Unrestricted bequests** do not include a specific designation and therefore allow funds to be allocated by the University. Leaving your bequest unrestricted allows your gift to be allocated to the areas of greatest need at the University.
Example Language for Bequests to Notre Dame

The following are examples of bequest language you can provide to your attorney. Each benefactor’s situation is unique and these examples include some but not all the possible bequest structures.

Percentage of estate for unrestricted purposes
I give, devise, and bequeath to the University of Notre Dame, a not-for-profit organization located in Notre Dame, Indiana (“Notre Dame”), ___ percent (___%) of the rest, residue, and remainder of my estate to be used as I have directed, from time to time, in a separate written fund agreement by and between me and Notre Dame; provided, however, if no such fund agreement exists at the time of my death, then for its general purposes of Notre Dame.

Percentage of estate for specific purposes with an endowment provision
I give, devise, and bequeath to the University of Notre Dame, a not-for-profit organization located in Notre Dame, Indiana (“Notre Dame”), ___ percent (___%) of the rest, residue, and remainder of my estate to be used as I have directed, from time to time, in a separate written fund agreement by and between me and Notre Dame; provided, however, if no such fund agreement exists at the time of my death, then for its general purposes.

Specific amount for unrestricted purposes
I give, devise, and bequeath to the University of Notre Dame, a not-for-profit organization located in Notre Dame, Indiana (“Notre Dame”), the sum of $_______ in cash or in-kind as an unrestricted gift to be used for the general purposes of Notre Dame.

Specific amount for specific purposes
I give, devise, and bequeath to the University of Notre Dame, a not-for-profit organization located in Notre Dame, Indiana (“Notre Dame”), the sum of $_______ in cash or in-kind to be used as I have directed, from time to time, in a separate written fund agreement by and between me and Notre Dame; provided, however, if no such fund agreement exists at the time of my death, then for its general purposes.

Ensure Your Wishes Are Carried Out As You Intend

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. There are several reasons why this is important:

- **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.
- **Secondly,** 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 and qualifies you for membership in the Stephen Theodore Badin Guild, a giving society established to honor all those who make Notre Dame a part of their personal legacy through a planned gift.

Thank you for considering a planned gift to the University of Notre Dame.