



## BEQUEST INTENTION

### INCLUDING NOTRE DAME IN YOUR ESTATE PLAN

Bequests and other testamentary gifts by generous alumni and friends have been a significant source of financial support for Notre Dame since the early days of the University. The continuation and expansion of this tradition of remembrance will contribute to Notre Dame's long-term financial strength and continued academic excellence.

A gift to the University through your estate plan qualifies you as a member of the [Badin Guild](#), an organization that honors and stewards those donors whose foresight and generosity are building the future of Notre Dame.

There are several ways to make a gift through your will, codicil, or trust instrument:

- You can make a specific gift to the University of cash, securities, real estate, or other property.
- You can designate Notre Dame as the beneficiary of a specific percentage of your estate.
- You can designate Notre Dame as the beneficiary of all or part of the remainder of your estate or trust after the payment of estate-related expenses and other bequests.

Another way to include Notre Dame in your estate plan is to name the University as a beneficiary of your retirement plan or life insurance policy.

A bequest or trust provision for the benefit of Notre Dame may qualify your estate for an estate tax charitable deduction. Learn more about [sample language for bequests and trusts](#).

If you wish to document your bequest intention at this time, please complete the [bequest notification form](#). For more detailed information on including Notre Dame in your estate plan, please contact:

Office of Gift Planning  
1100 Grace Hall  
Notre Dame, IN 46556-5612  
Phone: (574) 631-2661  
Fax: (574) 631-6957  
[Badin1@nd.edu](mailto:Badin1@nd.edu)



## DOCUMENTING YOUR BEQUEST INTENTION

In order to support the educational mission of Notre Dame, I have included a non-contingent bequest to the University of Notre Dame as part of my estate plan. A copy of the relevant provision of my will, trust, or beneficiary designation form is attached. If I make any change to this provision, I will notify the University of such change.

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Name

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Street, City, State, Zip

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Home Telephone

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Business Telephone

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Current Value of Bequest

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Date of Birth  
(for reunion/campaign gift recognition)

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Signature

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Date

### **Reunion / Campaign Gift Recognition**

You may be eligible to receive reunion or campaign gift recognition at a discounted value based on your age.

### **Please mail or fax this form and supplementary documentation to:**

Office of Gift Planning  
University of Notre Dame  
1100 Grace Hall  
Notre Dame, IN 46556 -5612

Phone: (574) 631-2661

Fax: (574) 631-6957

Email: [badin1@nd.edu](mailto:badin1@nd.edu)

Website: [www.supporting.nd.edu/giftplanning](http://www.supporting.nd.edu/giftplanning)