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# NOTRE DAME ALUMNUS



## ALUMNI FUND PROGRESS REPORT

### Percentage of Class Participation (As of November 20, 1959)

Class	Amount Contributed	Number of Alumni	Number of Contributors	Percentage of Participation
1900 and before	\$1,195.00	63	7	11.1
1901	25.00	10	1	10.0
1902	35.00	18	3	16.6
1903	230.00	17	4	23.5
1904	1,209.91	24	8	33.3
1905	590.00	21	8	38.9
1906	1,180.00	32	8	25.0
1907	615.00	20	5	25.0
1908	350.00	28	3	10.7
1909	1,385.34	32	7	21.8
1910	1,175.15	30	4	13.3
1911	710.00	63	16	25.3
1912	1,255.00	54	14	25.9
1913	1,265.00	59	20	33.8
1914	2,867.64	72	21	29.1
1915	2,049.00	64	22	34.3
1916	17,653.58	65	17	26.1
1917	1,975.00	100	30	30.0
1918	700.00	79	24	30.3
1919	1,460.00	67	12	17.9
1920	625.00	88	15	17.0
1921	2,246.00	108	34	31.4
1922	10,075.00	182	43	23.6
1923	5,174.50	232	59	21.1
1924	2,597.50	218	53	24.3
1925	4,766.00	308	84	27.2
1926	5,803.00	257	75	29.1
1927	4,105.50	399	103	25.8
1928	35,386.00	471	113	23.9
1929	5,503.00	468	99	21.1
1930	3,588.00	485	115	23.7
1931	6,314.05	509	134	26.3
1932	5,270.00	518	114	22.0
1933	5,720.00	554	119	21.4
1934	4,963.81	576	112	19.4
1935	4,928.00	541	123	22.7
1936	3,523.50	427	85	19.9
1937	2,563.02	459	99	21.5
1938	4,638.52	521	126	24.1
1939	4,632.00	573	135	23.5
1940	7,960.62	646	171	26.4
1941	3,674.00	587	154	24.7
1942	3,734.00	575	150	26.0
1943	5,004.85	581	159	27.3
1944	3,507.00	576	146	25.3
1945	1,879.00	341	88	25.8
1946	1,277.00	307	63	20.5
1947	2,375.50	705	146	20.7
1948	4,576.50	1038	246	23.6
1949	6,443.85	1411	337	23.8
1950	5,037.00	1171	293	25.1
1951	4,282.00	919	233	25.3
1952	4,111.10	1107	298	26.9
1953	3,915.50	980	275	28.0
1954	3,486.28	1039	273	26.2
1955	4,221.90	992	286	28.8
1956	4,041.99	1122	318	28.3
1957	3,388.86	1163	330	28.3
1958	3,758.90	1266	306	24.1
1959	2,212.00	1267	171	13.4
**Undergraduates	20,305.00		3	
Alumni Corporations	45,370.32		72	
Honorary	11,425.03		7	
Gifts in Kind	11,669.00		6	
Clubs	22,914.07		31	
<b>Total</b>	<b>\$350,999.29</b>	<b>26605</b>	<b>6636</b>	<b>24.9</b>

\*\*Student Senate \$20,000.

### PARTICIPATION LAGGING IN 1959

Notre Dame alumni have been a generous and significant part of Notre Dame progress. From the establishment of the Annual Alumni Fund, on a permanent annual basis, 1941 to the present, alumni have given \$5,857,665. This is an outstanding record, which adds the important factor of a participation percentage (which went as high as 52%) ranking among the leading college and university statistics, and twice or more above the national alumni participation average.

This record is sincerely appreciated. It is the good picture.

But in the face of continuing pressures of private education, we would be losing the advantages of this fine past if we did not maintain our attention to the present and future. Your Alumni Board asks your consideration.

Last year, for example, alumni participation dropped from the 1957 figure of 49.2% to the 1958 total 45.8%.

Most of our fluctuation, we feel, comes from oversight, rather than from failure to understand, or inability to make some contribution. This belief is reflected in a high mortality of donors from one year to the next, which varies greatly. It comes from not meeting someone face to face to remind us. It comes, too, possibly, from a feeling that Notre Dame's program is not quite as urgent as the several we can see building about us, in our own city, or parish, or diocese.

Look at the accompanying progress report, to Nov. 20, for 1959. Don't wait for a personal reminder. Don't wait to try to "make it bigger." Our progress is vitally involved in the maintaining of the outstanding endorsement our alumni have given to Notre Dame each year. So sit down now and send something, if you have not yet done so for 1959. If you have, ask the next alumnus you meet if he has.

# ALUMNI FINANCIAL SUPPORT — Editorial

Why do American colleges and universities expect, ask for, and get, generous support from alumni?

It is because the unprecedented progress of America has been inseparably linked with its systems of education — public and private.

It is because those who have benefitted from this education are aware of its values, and determined that the opportunities will be passed on to new generations.

Public education has served the great purpose of offering opportunity to all.

Private education has served the great purpose of offering opportunity for expression, for research, for experiment, for qualitative achievements, and more recently for spiritual emphasis and content, which the system of public education cannot support.

The two systems, working side by side, have proved their merit and made us great.

Tax-supported colleges and universities receive alumni support largely for those areas of research, student aid, and administrative and faculty independence, which budget procedures and tax resources, together with public opinion, sometimes cannot encompass.

The support of alumni for the private colleges and universities is for the more basic life and death battle with rising costs which the absence of tax support has brought to private higher education.

It is vital for our educational tradition that our balance is not lost, though the trend is moving, in enrollment, from the private to the more economically flexible public institutions.

Alumni support is not "paying off old debts." It is not "building academic monuments." It is not "perpetuating sentimental shrines." It is not "keeping up with intellectual Joneses."

Alumni support is simply assuring for America's future a prime and proved factor in the tremendous historical development to our time.

You should take pride in being a part of this pattern.

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## OTHER FRONTS

Dartmouth has just completed a \$17,000,000 three-year phase of a longer and larger development program. More than 60% of Dartmouth alumni participated. Leaders in the 1958 annual alumni fund survey of some 600 colleges and universities were Dartmouth and Princeton, with over 70% participation each.

Duke University, commenting on the fact that it has few alumni before 1932, and that a large number of alumni give \$10 or less (8,000 of our N.D. 11,600 alumni gifts in 1958 were in this category), is moving toward an increase in the amount of the individual gift. The first 146 responses to the current appeal show a 40% increase. Notre Dame's problem is similar to Duke's (except that Duke has \$41,779,699 endowment as against Notre Dame's \$19,037,000 — 1959 World Almanac).

University of San Francisco has just announced an increase of almost 30% in its alumni contributions over the preceding year's fund.

Emory University's latest annual fund shows a 25% increase in amount over the preceding year — both years new records in amounts.

Manhattan College alumni jumped from a previous record of 1,474 contributors to 2,661 donors, and in amount from a record high of \$72,696 to \$118,011, in their latest report.

R.P.I. reports its latest fund up some 25% in participation over 1955, and up 66% in amount that year, with steady growth in between.

Vanderbilt's latest fund report moved participation up some 10% to a new high, and \$50,000 more in amount than the preceding year, and up of some 50%.

Notre Dame is not alone in its problems, nor in its program to solve them. The above are haphazard items from exchange alumni magazines that cross our desk. This is not only a sample of the *company* we are in, but the *competition*, if we are to meet our "commitment to excellence."

# Notre Dame Announces New Tax-Free Life Income Plan

A Tax-Free Life Income Plan has recently become an integral part of Notre Dame's Estate Planning Program to obtain financial support for the University on a current and long-range basis as well as provide tax benefits for the donor.

The following paragraphs will briefly describe some of the outstanding features of this Plan.

We are fortunate in that we live in a country whose Government recognizes the importance of private educational institutions as a bulwark of our traditional freedom and national welfare and encourages financial support of these institutions by granting special tax benefits to persons who aid them.

Today, the cost of a first-rate education is so high that relatively few students can afford the entire bill. To make sure that Notre Dame's share of tomorrow's leaders are not denied the education they desire and deserve, the University must turn to alumni and other friends who sympathize with her aims and are willing to help in her important objectives.

The Notre Dame Tax-Free Life Income Plan is one important way by which a benefactor may offer such help to the University while at the same

time securing many substantial federal-approved tax benefits for himself and his estate. Finally, such a benefactor will experience the rewarding personal satisfaction resulting from a charitable gift to one of our country's outstanding institutions of higher learning.

This Plan has four Federal tax advantages:

The donor is entitled to a deduction in computing his Federal income tax to the extent of 30% of his adjusted gross income for the year of the donation based on the imputed value of the gift to the University, thus reducing his Federal income tax for that year;

Because the University is a tax-exempt institution, it is able to sell the appreciated property without incurring a capital gains tax on the appreciation in value, thereby preserving the full value of the property for reinvestment in tax-free bonds;

Because the investment by the University will be in tax-exempt State or municipal obligations, the interest income paid to the designated life beneficiary or beneficiaries will be free from Federal income tax; and

The taxable estate of a donor is reduced by the value of the property donated.

The details of the Plan are simple and are governed by a contract, the tax consequences of which have been approved by the Internal Revenue Service of the Treasury Department of the United States. According to the terms of the contract, in consideration of the donor's gift which may be of cash, stocks, bonds, real estate, or other property acceptable to the University, the University agrees to sell the property and to reinvest the net proceeds from the sale (or invest the cash) in State or municipal bonds which are exempt from Federal income tax. The University further agrees to pay, as collected, which usually will be twice a year, interest from the bonds during the life of one or two persons designated by the donor.

Upon the death of the person or persons designated, the bonds become the property of the University.

The donor has the option of designating one or two persons, one of whom may, but need not be himself. His choice of other beneficiaries is not limited to relatives. The sole limitation is that, ordinarily, each beneficiary must be age 40 years or older. If either is under 40, however, a nominal annual fee for management will be charged.

The value of the initial contribution must be at least \$10,000, but any number of subsequent contributions may be made so long as each is at least \$1,000.

The University is obligated to purchase only high grade bonds. In choosing what bonds are to be purchased, the University will carefully consider the advice of the donor, but need not be governed by it. Normally, investment will be in bonds having a maturity date later than the life expectancy of the life beneficiary or beneficiaries. In the event that bonds mature or are redeemed prior to the death of the life beneficiary or beneficiaries, the University will reinvest the proceeds in other tax-exempt bonds. Similarly, the University reserves the right to replace bonds as circumstances warrant. If the State of the donor's residence has an income tax, the investment by the University usually will be in bonds of that State so as to preclude State income tax on the interest from the investment.

Except as noted above, no management fee will be charged by the University for the sale of the original property donated, for the investment or reinvestment in the tax-exempt bonds, or for the collection of interest from such bonds. However, the actual costs incurred in the initial sale of the donated property will reduce the proceeds from such sale.

## THE UNIVERSITY OF NOTRE DAME INVITES YOUR INTEREST IN

### TAX-FREE *Life Income Plan*

The Federal Government encourages private aid to education by granting important tax benefits to benefactors of our colleges and universities. The University of Notre Dame welcomes such financial assistance and announces a plan whereby you may assist higher education while taking advantage of the Government's liberal tax provisions.

*This plan has particular appeal to persons who have substantial unrealized capital gains.*

Your gift of securities or other property is sold by the University without capital gains tax and reinvested in tax-exempt bonds, the income from which is paid tax-free for life to one or two beneficiaries, one of whom may be you. Here are some of the benefits of this plan resulting from your gift:

- ★ NO CAPITAL GAINS TAX ON DONATED PROPERTY.
- ★ LIFETIME TAX-FREE INCOME.
- ★ AN INCOME-TAX DEDUCTION IN THE YEAR OF THE GIFT.
- ★ SAVINGS IN ESTATE AND INHERITANCE TAXES.
- ★ REWARDING PERSONAL SATISFACTION OF A GIFT TO NOTRE DAME, PERPETUATED IN YOUR LIVING MEMORIAL ON THE CAMPUS.

The University will appreciate all efforts to make this Plan known.

For more information write to:

*The Director  
Dept. H*

**UNIVERSITY OF NOTRE DAME FOUNDATION**

*Notre Dame, Indiana*

Merry Christmas to you —

Happy New Year from you!

**SEND YOUR  
1959  
CONTRIBUTION  
NOW!**

A gift in any amount is welcome, sincerely:

\$1 is truly valuable, as participation and endorsement.



\$5 covers our per capita cost of records, magazine, mailings, etc.



\$10 contributes direct aid to the University in its current problems.



\$25—and up—accelerates the progress constantly beckoning to Notre Dame.

**Notre Dame's  
1958-1967 Program**

1. Endowment for Increased Faculty Salaries .....\$27,000,000
2. Contributions for Research .....\$11,000,000
3. Student Aid .....\$ 5,000,000
4. Special Funds for Administrative Purposes \$ 5,000,000
5. New Buildings .....\$18,600,000

**Additions to**

a) Commerce	\$ 500,000
b) Law	\$ 500,000
c) Engineering	\$ 500,000
Library	\$5,000,000
(2) Graduate Halls	\$2,500,000
Priests' Faculty Building	\$1,500,000
Maintenance Center	\$ 600,000
Auditorium	\$3,500,000
Fieldhouse	\$4,000,000
<b>TOTAL</b>	<b>\$66,600,000</b>

*May Our Lady and Her Divine Son  
Bestow on You the Joyous  
Blessings of Christmas and the  
Happiness of Another New Year*

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YOUR SELF-  
STUDY SURVEY!**