



# Additional Contribution

Complete this form to make an additional contribution of **\$5,000 or more** to an existing donor advised fund account. Additional forms and brochures are available to be printed directly from our website at [www.nptrust.org](http://www.nptrust.org). If you need assistance filling out this form, call us toll-free at **1-888-878-7900**.

## 1. Account Name

Account Name: \_\_\_\_\_

## 2. Donor Information

Identify all registered owners of the assets being donated. **Note:** NPT's substantiation letter, which is provided for federal tax reporting purposes, will be sent to the person(s) listed below.

**Trust**

Name of Trust Agreement: \_\_\_\_\_

\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_  
Taxpayer Identification Number

\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_  
Trust Date (month, day, year)

**Donor 1**

Mr./Mrs./  
Ms./Dr./ \_\_\_\_\_  
Other \_\_\_\_ Owner, Trustee, or Officer (first, middle initial, last)

\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_  
Date of Birth (month, day, year)

Address: \_\_\_\_\_

\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_  
Social Security Number

City/State/Zip: \_\_\_\_\_

(\_\_\_\_-\_\_\_\_-\_\_\_\_) \_\_\_\_\_-\_\_\_\_\_  
Daytime Telephone Number

E-mail: \_\_\_\_\_

(\_\_\_\_-\_\_\_\_-\_\_\_\_) \_\_\_\_\_-\_\_\_\_\_  
Evening Telephone Number

**Donor 2**

Mr./Mrs./  
Ms./Dr./ \_\_\_\_\_  
Other \_\_\_\_ Joint Owner, Co-Trustee or Officer (first, middle initial, last)

\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_  
Date of Birth (month, day, year)

Address: \_\_\_\_\_

\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_  
Social Security Number

City/State/Zip: \_\_\_\_\_

(\_\_\_\_-\_\_\_\_-\_\_\_\_) \_\_\_\_\_-\_\_\_\_\_  
Daytime Telephone Number

E-mail: \_\_\_\_\_

(\_\_\_\_-\_\_\_\_-\_\_\_\_) \_\_\_\_\_-\_\_\_\_\_  
Evening Telephone Number

### 3. Gift Information

Refer to the instructions provided in **How to Make New or Additional Contributions**, or call the National Philanthropic Trust for assistance. Additional contributions to existing donor advised fund accounts is \$5,000.

**Cash**

Dollar Amount \$ \_\_\_\_\_

<input type="checkbox"/> <b>Check</b>	<b>Make payable to:</b> National Philanthropic Trust  <b>Please mail to:</b> National Philanthropic Trust 165 Township Line Road Suite 150 Jenkintown, PA 19046	<input type="checkbox"/> <b>Wire</b>	UBS AG ABA #: 026007993 A/C Title: UBS Financial Services A/C #: 101-WA-258641-000 F/C A/C Title: National Philanthropic Trust F/C A/C #: PY19422
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**Securities**

**Important:** If you are transferring securities attach a completed **Delivery Instructions for Securities** form. If you are transferring endorsed security certificates or securities, attach a completed **Letter of Authorization**.

Name of Security	Number of Shares	CUSIP or Symbol	Estimated Dollar Value

**Mutual Fund Shares**

**Important:** If you are transferring mutual funds, attach a completed **Letter of Authorization** with **medallion signature guarantee** and a recent account statement from your current institution.

Fund Company/Fund Name/Ticker	Number of Shares	Account Number

**Donation from Other Charitable Organization/Vehicle\*, Private Foundation, or Donor Advised Fund**

Name of Charitable Organization/Vehicle: \_\_\_\_\_

Estimated Dollar Amount: \$ \_\_\_\_\_ Type of Gift: \_\_\_\_\_

Special Instructions: \_\_\_\_\_

\* Includes Charitable Lead Trust, Charitable Remainder Trust, and other charitable giving vehicles

### 4. Acknowledgement of Terms (All donors or trustees named in **Section 2** must sign below)

I understand that my gift of the property described in **Section 3** to the National Philanthropic Trust (NPT), a 501(c)(3) public charity, are irrevocable and unconditional. I acknowledge that I have read the Program Circular and agree to the terms and/or conditions contained therein. I certify that, to the best of my knowledge, all information enclosed is accurate and I will notify NPT in writing of any changes.

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### 5. Return this completed form and other required documentation to:

**Mail:** National Philanthropic Trust  
 165 Township Line Road, Suite 150  
 Jenkintown, PA 19046

**Fax:** (215) 277-3029