



Bequest Notification

Complete this form **to make a bequest of \$5,000 or more from your will, IRA, 401(k) or other qualified plan, trust, or insurance policy** upon your death to an existing National Philanthropic Trust donor advised fund. Additional forms are available at www.nptrust.org. For assistance, please contact NPT toll-free at **(888) 878-7900**.

1. Fund

Fund Name: _____
 Primary Advisor: _____

2. Donor

Identify all registered owners of the assets being donated. (**Note:** National Philanthropic Trust's contribution receipt, which is provided for federal tax reporting purposes, will be sent to the person(s) or trust listed below.)

Individual(s)

Mr./Mrs./Ms./Dr. _____ / / _____
 Primary Donor (first, middle initial, last) Date of Birth (month/day/year)
 Address: _____ - - _____
 Social Security Number
 City/State/Zip: _____ () - _____
 Primary Telephone Number
 E-mail: _____

Mr./Mrs./Ms./Dr. _____ / / _____
 Joint Owner (first, middle initial, last) Date of Birth (month/day/year)
 Address: _____ - - _____
 Social Security Number
 City/State/Zip: _____ () - _____
 Primary Telephone Number
 E-mail: _____

Trust (A copy of the Trust Agreement with any amendments must accompany all initial contributions from trusts.)

Name of Trust Agreement: _____
 _____ / / _____
 Taxpayer Identification Number Trust Date (month/day/year)
 _____ () - _____
 Trustee Name (first, middle initial, last) Primary Telephone Number

3. Transfer Instructions

Check	Cash	Stock, Mutual Funds, Bonds
Make payable to: National Philanthropic Trust Mail to: National Philanthropic Trust 165 Township Line Road, Suite 150 Jenkintown, PA 19046	Bank: UBS AG ABA Number: 026007993 A/C Title: UBS Financial Services Inc. A/C Number: 101-WA-258641-000 F/C A/C Title: National Philanthropic Trust F/C A/C Number: PY19422	Brokerage Firm: UBS Financial Services For Benefit of: National Philanthropic Trust DTC Number: 0221 A/C Title: National Philanthropic Trust A/C Number: PY19422

4. Assets

Refer to the instructions provided in **How to Make New or Additional Contributions**, or call NPT for assistance. If you are transferring stock, mutual funds or bonds, attach a **copy** of the **Letter of Authorization** indicating where the assets are held. Send the **original Letter of Authorization** to the firm at which the assets are held.

Cash

Dollar Amount: \$ _____ By check By wire

Stock

Name of Stock	Trading Symbol	Number of Shares	OR	All Shares
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>

Mutual Funds

Name of Mutual Fund	Trading Symbol	Number of Shares	OR	All Shares
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>

Bonds

Name of Bond	CUSIP	Quantity or Face Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____

Physical Certificates

Mail **Physical Certificate** and **Irrevocable Stock or Bond Power** with **medallion guarantee** under separate cover to National Philanthropic Trust.

Restricted Stock, Privately Held Stock and Real Estate

For assistance, please contact NPT toll-free at **(888) 878-7900**.

Grant or Transfer from Private Foundation or Donor Advised Fund

Estimated Dollar Amount: \$ _____ By check By wire

5. 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 4** is an irrevocable and unconditional contribution when received and accepted by National Philanthropic Trust (NPT), and that NPT retains exclusive legal control over contributed assets. I acknowledge that I have read the NPT Program Guide and agree to the terms and/or conditions contained therein. I certify that, to the best of my knowledge, all information in connection with this application is accurate and I will notify NPT in writing of any changes.

Donor or Trustee Signature _____
Date (month/day/year)

Donor or Trustee Signature _____
Date (month/day/year)

6. 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