



National
Philanthropic
Trust

Deadlines for Making Year-End Charitable Contributions to Your Donor Advised Fund

This quick reference primer will assist you in making contributions to your donor advised fund. Following the guidelines below will ensure that we receive and process your contributions by the IRS deadline for inclusion in your 2008 tax return. Contributions must be made to “National Philanthropic Trust” in order for them to be eligible for tax deduction purposes. Additional forms and brochures are available to be printed directly from our website at www.nptrust.org. If you need assistance, please call us toll-free at **888-878-7900**.

Type of Contribution	What To Do	Deadline
Check	Checks sent via U.S. Mail, Federal Express, or UPS must be postmarked on or before December 31.	December 31
Money Wire	Provide your financial institution and National Philanthropic Trust with a contribution form. If opening a new account, using the instructions provided on the Additional Contribution form, instruct the financial institution to wire the funds on or before December 31. If making a contribution to an existing account, complete the Additional Contribution form, and using the instructions provided instruct the financial institution to wire the funds on or before December 31. Allow your financial institution 3-5 days for processing.	December 31
Stock Certificate	Postmark on or before December 31.	December 31
Securities	Submit a completed Letter of Authorization to the firm holding the stocks. Submit a copy of the Letter of Authorization and complete additional contribution form to National Philanthropic Trust. All transfers must be received by 1 p.m., EST on December 31.	December 31
Mutual funds	Submit a completed Letter of Authorization and your most recent mutual fund statement to National Philanthropic Trust.	December 15
Special Securities including: <ul style="list-style-type: none">• Private/Closely-Held Stock• Restricted Stock	Instruct your broker to contact National Philanthropic Trust at 888-878-7900 to transfer special securities to National Philanthropic Trust. Be sure to include the name of the donor advised fund and account number.	December 8