



## Deadlines for Year-End Contributions

This quick reference primer will assist you in making year-end contributions to your donor advised fund. Following the guidelines below will ensure that National Philanthropic Trust (NPT) receives and process your contributions by the IRS deadline for inclusion in your 2009 tax return. Contributions must be made to “National Philanthropic Trust” in order to be eligible for tax deduction purposes. Additional forms are available at [www.nptrust.org](http://www.nptrust.org). For assistance, please contact NPT toll-free at **(888) 878-7900**.

Type of Contribution	What to Do	Deadline
<b>Check</b>	Submit a Contribution Agreement to National Philanthropic Trust.  US Mail <u>postmarked by</u> December 31, 2009  FedEx/Overnight must be <u>received by</u> December 31, 2009  PLEASE NOTE NAME OF THE DONOR ADVISED FUND IN MEMO SECTION OF CHECK	<b>December 31</b>
<b>Money Wire</b>	Submit a Contribution Agreement to National Philanthropic Trust. Using the instructions provided on the Contribution Agreement, instruct the financial institution to wire the funds on or before December 31. Allow your financial institution 3-5 days for processing.	<b>December 31</b>
<b>Stock</b>	Submit a completed Letter of Authorization to the firm holding the stocks. Submit a copy of the Letter of Authorization and a Contribution Agreement to National Philanthropic Trust. NPT must receive all transfers by 1 p.m., EST on December 31.	<b>December 31</b>
<b>Stock Certificates</b>	Submit a Contribution Agreement to National Philanthropic Trust.  US Mail <u>postmarked by</u> December 31, 2009  FedEx/Overnight must be <u>received by</u> December 31, 2009  SEND CERTIFICATES AND STOCK POWER UNDER SEPARATE COVER	<b>December 31</b>
<b>Bonds</b>	Submit a completed Letter of Authorization to the firm holding the stocks. Submit a copy of the Letter of Authorization and a Contribution Agreement to National Philanthropic Trust. All transfers must be received by 1 p.m., EST on December 31.	<b>December 31</b>
<b>Mutual Funds</b>	Submit a completed Letter of Authorization and your most recent mutual fund statement to National Philanthropic Trust.	Initiate transfer by <b>December 7</b>
<b>Special Securities, Real Estate, Closely-Held Stock</b>	Instruct your broker to contact National Philanthropic Trust toll-free at (888) 878-7900 to transfer special securities.	Initiate transfer by <b>December 1</b>