



Letter of Authorization

Use this form to authorize the electronic transfer of assets to National Philanthropic Trust (NPT). When completed and signed, this form will serve as your transfer instructions to the firm holding the assets. **Mail the original form to the firm where the assets are held to initiate the transfer.** Mail or fax a **copy** of this form with a completed **Contribution Agreement** to NPT. Additional forms are available at www.nptrust.org. For assistance, please contact NPT toll-free at **(888) 878-7900**.

1. Current Financial Advisor or Firm

Name of Financial Advisor or Firm Holding Your Securities: _____

Contact Name: _____ () - _____

Primary Phone Number

Address: _____

City/State/Zip: _____

Account Number

2. Transfer Instructions

Please accept these instructions as the authorization to transfer the assets specified below to NPT's brokerage account. **Important:** Securities should be transferred in-kind and are not to be liquidated.

Stock, Mutual Funds, Bonds	
Forms to be completed:	Contribution Agreement Letter of Authorization
DTC Eligible Securities:	Brokerage Firm: UBS Financial Services For Benefit of: National Philanthropic Trust DTC Number: 0221 A/C Title: National Philanthropic Trust A/C Number: PY19422

3. Assets

Stock

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

Mutual Funds

Important: To transfer shares specified below, attach a recent account statement from the firm at which the shares are held. We suggest you contact NPT when completing this section to ensure a smooth transfer.

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

Bonds

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

4. Acknowledgement of Terms (This section must be signed by all registered owners of the assets to be donated.)

I hereby irrevocably relinquish all right, title, and interest to the assets specified in **Section 3** of this document. I understand that my gifts of property are irrevocable and unconditional contributions 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.

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

Donor Advised Fund Name

5. Medallion Signature Guarantee

Some assets require a medallion signature guarantee for transfer. Contact your **Financial Advisor** to determine if this is required for the transfer of your assets. A medallion signature guarantee can only be obtained from a bank or broker – **not** from a notary. List additional assets on separate pages, and obtain a medallion signature guarantee on each page.

Name, Institution and Title

Signature of Authorized Officer

_____/_____/_____
Date (month/day/year)

Medallion Signature Guarantee Required
Authorized Officer to Place Stamp Here

Applies to all signatures in Section 4

6. Return a copy of this form, a Contribution Agreement and any other required documentation to:

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

Fax: (215) 277-3029