

Donor Application

For Private Foundations and Companies

Complete this form and a "**Contribution Agreement for Foundations and Companies**" to establish a donor-advised fund of \$25,000 or more with National Philanthropic Trust (NPT). A corporate resolution should accompany this form and will remain in effect until NPT is notified in writing that it has been revoked. Additional forms are available at www.IndependentGift.org. If you need assistance, call toll free at (888) 878-7900 or send an email to npt@nptrust.org.

1. Donor-Advised Fund Information

Choose a name for your donor-advised fund. You can name it for your organization ("The ABC Corporation Fund" or "The ABC Foundation"), in memory of someone, or for a particular charitable purpose ("The ABC Education Fund").

Donor-Advised Fund Name

2. Foundation/Company/Organization Information

Identify the organization donating assets to establish this donor-advised fund.

Organization Name

Primary Telephone #

Street Address

City/State

Zip

3. Authorized Officer

Identify the individual who is authorized to view fund information, and recommend grants/investment allocations on behalf of the organization.

Mr. Mrs. Ms. Dr.

First Name, MI, Last Name

Title

Signature

Email

Primary Telephone #

4. Secondary Officer

If the Authorized Officer is unavailable, the authority to view fund information, recommend grants/investment allocations will be assumed by the Secondary Officer, and all communications will be routed through this individual until NPT is informed in writing of a new Authorized Officer.

Mr. Mrs. Ms. Dr.

First Name, MI, Last Name

Title

Signature

Email

Primary Telephone #

5. Investment Allocation

Please recommend an asset allocation for your donor advised fund account. You may choose one strategy from among the four that are listed below. Investment option descriptions and fees can be found in the Program Guide.

CONSERVATIVE STRATEGY

For donors planning to grant the balance of their account within 5 years

- 52.5% iShares Barclays Aggregate (AGG)
- 12.5% iShares Barclays TIPS (TIP)
- 15% iShares S&P 500 Index (IVV)
- 15% iShares Dow Jones Select Dividend Index Fund (DVY)
- 5% JP Morgan U.S. Government Money Market Fund

BALANCED STRATEGY

For donors planning to grant the balance of their account within 5 to 10 years

- 45% iShares S&P 500 Index (IVV)
- 12.5% iShares Barclays Aggregate (AGG)
- 12.5% iShares Barclays TIPS (TIP)
- 15% iShares iBoxx \$ Investment Grade Corporate Bond Fund (LQD)
- 10% iShares Dow Jones Select Dividend Index Fund (DVY)
- 5% JP Morgan U.S. Government Money Market Fund

GROWTH STRATEGY

For donors planning to use their account for more than 10 years and/or name successors

- 40% iShares Russell 300 Growth Index Fund (IWZ)
- 15% iShares Russell Midcap Index Fund (IWR)
- 15% iShares S&P 500 Index (IVV)
- 10% iShares MSCI EAFE Index Fund (EFA)
- 7.5% iShares Barclays Aggregate (AGG)
- 7.5% iShares Barclays TIPS (TIP)
- 5% JP Morgan U.S. Government Money Market Fund

MONEY MARKET

For donors seeking the preservation of principal

- 100% JP Morgan U.S. Government Money Market Fund

6. Acknowledgement of Terms (This section must be signed by the Primary Advisor.)

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 "ICGF 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.

Primary Advisor Signature

Date

7. Return this completed form by mail or fax to:

National Philanthropic Trust | 165 Township Line Road, Suite 150 | Jenkintown, PA 19046 | Fax: (215) 277-3029