



# Discretionary Investment Request

Complete this form to recommend a change to the investments and/or holdings for your donor-advised fund. Before recommending an allocation, please review NPT's Investment Policy Guidelines form for approved investment options. Additional forms are available at [www.nptrust.org](http://www.nptrust.org). If you need assistance, call toll free at (888) 878-7900 or send an email to [npt@nptrust.org](mailto:npt@nptrust.org).

## 1. Fund Information

\_\_\_\_\_ Fund Name

\_\_\_\_\_ Primary Advisor

\_\_\_\_\_ Donor Name

\_\_\_\_\_ Primary Telephone #

\_\_\_\_\_ Email

## 2. Investment/Transaction Recommendation

Please detail in the space below your recommendation (attach a separate form if necessary):

## 3. Acknowledgement of Terms

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 NPT will take under advisement the investment recommendation, but reserves the right to change the investment allocation under any circumstances. I certify that, to the best of my knowledge, all information in connection with this investment request form is accurate, that it is a recommendation subject to NPT's review and approval, and that all transactions executed by NPT are final. I acknowledge that I have read the NPT Program Guide and agree to the terms and/or conditions contained therein, and that I will notify NPT in writing of any changes.

\_\_\_\_\_ Primary Donor Signature/Authorized Representative

\_\_\_\_\_ Date

## 4. Return this completed form and other required documentation by mail or fax to:

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

### Internal Use Only

NPT Investment Committee

Date \_\_\_\_\_

Staff Review -  EH  AH  TG  KS  MB

Date \_\_\_\_\_

Transaction Executed

Date \_\_\_\_\_