



National
Philanthropic
Trust

Donor Application

Complete this form and a "**Contribution Agreement**" to establish a donor-advised fund of \$25,000 or more with National Philanthropic Trust (NPT). Additional forms are available at www.nptrust.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 may name it for yourself, for your family ("The Smith Family Charitable Fund"), in memory of someone, or for a particular charitable purpose ("Save the Rain Forests Fund").

Donor-Advised Fund Name

2. Primary Advisor

Identify the Primary Advisor for the fund (typically, this is also the Primary Donor to the fund)

Mr. Mrs. Ms. Dr.

First Name, MI, Last Name

Date of Birth

Social Security #

Street Address

City/State

Zip

Email

Primary Telephone #

3. Joint Advisor

You may name an individual (such as a spouse, family member, friend or other) as Joint Advisor to your fund who also has the authority to recommend grants and investment allocations, view fund information and name successors. They will assume the role of Primary Advisor to the account in the event of the death of the Primary Advisor.

Mr. Mrs. Ms. Dr.

First Name, MI, Last Name

Date of Birth

Social Security #

Street Address

City/State

Zip

Email

Primary Telephone #

4. Secondary Advisor(s)

You may name Secondary Advisors to your fund who will have the authority to recommend grants. Secondary Advisors will not succeed the Primary and Joint Advisors unless they are also named as Successors in Section 6A. To indicate additional Secondary Advisors you may attach a separate sheet.

Mr. Mrs. Ms. Dr.

First Name, MI, Last Name

Date of Birth

Social Security #

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Primary Telephone #

Mr. Mrs. Ms. Dr.

First Name, MI, Last Name

Date of Birth

Social Security #

Street Address

City/State

Zip

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Primary Telephone #

5. Financial Advisor

You may name a Financial Advisor to your fund if you wish to do so. A Financial Advisor may be given the authority to recommend investment allocations and recommend grants on the Primary Advisor's behalf.

Financial Advisor Name

Financial Institution

Street Address

City/State

Zip

Email

Primary Telephone #

Financial Advisor is authorized to: Recommend investment allocations on the Primary Advisor's behalf
 Recommend grants on the Primary Advisor's behalf

6. Succession Plan

You may name individuals as Successor Advisors to succeed you in advising on the fund after the death of the Primary and Joint Advisors **OR** you may elect to name specific charities as the Charitable Beneficiaries of the funds. These recommendations may be changed at any time. To indicate additional Successor Advisors or Charitable Beneficiaries, you may attach a separate sheet.

In the event that the Charitable Beneficiary no longer exists, NPT will award grants to a charity whose mission is similar to the original charity.

A. Successor Advisors – Individual(s)

- Option 1:** Retain assets in fund; Successors will share fund administration; OR
- Option 2:** Create new separate funds, and divide assets equally among Successors.

Mr. Mrs. Ms. Dr.

First Name, MI, Last Name

Date of Birth

Social Security #

Street Address

City/State

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Email

Primary Telephone #

Mr. Mrs. Ms. Dr.

First Name, MI, Last Name

Date of Birth

Social Security #

Street Address

City/State

Zip

Email

Primary Telephone #

B. Charitable Beneficiaries - Charity(ies)

- Option 1:** Distribute all of the remaining assets in the fund to the following charity(ies); **OR**
- Option 2:** Designate a specific percentage to be annually distributed to the charity(ies).

Charity Name

Annual % (Option 2 only)

Street Address

City/State

Zip

Contact Name

Employer ID # (if known)

Primary Telephone #

Charity Name

Annual % (Option 2 only)

Street Address

City/State

Zip

Contact Name

Employer ID # (if known)

Primary Telephone #

7. Investment Allocation

Recommend an investment allocation for your fund by choosing either Option 1, 2, 3 or 4. Before making your recommendation, please review the respective strategy descriptions and performance on the “**Investment Descriptions and Options**” form which is available at www.nptrust.org.

Option 1: Money Market

Money market funds take the most conservative approach to maintaining original gift value.

- UBS Select Prime Institutional
- UBS Select Treasury Institutional

Option 2 : Actively Managed Model Portfolios

Using best-in-class mutual funds, these actively managed strategies have the potential to out-perform the market.

- Conservative Portfolio (conservative)
- Balanced Portfolio (moderate)
- Total Return Portfolio (moderate growth)
- Growth Portfolio (growth)

Option 3: Index Fund Model Portfolios

Using low-cost exchange-traded funds, these strategies provide an economical way to achieve a comparable return to the market.

- Conservative Portfolio (conservative)
- Balanced Portfolio (moderate)
- Total Return Portfolio (moderate growth)
- Growth Portfolio (growth)

Option 4: Personal Giving Strategy

Implement a customized giving strategy from among the following best-in-class mutual funds.

- _____ % Mainstay ICAP Select Equity
- _____ % Prudential Jennison 20/20 Focus
- _____ % Laudus Growth Investors
- _____ % Victory Special Value
- _____ % Columbia Acorn Select
- _____ % TCW Galileo Small Cap Growth
- _____ % JP Morgan International Value
- _____ % Federated International Small-Mid Company
- _____ % JP Morgan Emerging Markets
- _____ % Fidelity Advisors Emerging Markets
- _____ % PIMCO Total Return
- _____ % Pioneer Global High Yield
- _____ % Prudential Global Real Estate
- _____ % Prudential Jennison Natural Resources
- _____ % UBS Select Prime Institutional
- _____ % UBS Select Treasury Institutional

8. Acknowledgement of Terms (This section must be signed by the Primary and Joint Advisor, if one is listed.)

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. 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

Joint Advisor Signature

Date

9. 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