National Philanthropic Trust

Grant Recommendation

Complete this form to recommend a grant of $250 or more from your donor-advised fund to support a public charity. 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. Fund Information

_____ _____
Fund Name Primary Advisor

2. Grant Details

_____
Charity Name Distribution Amount ($250 minimum)

_____ _____ _____
Street Address City/State Zip

_____ _____ _____
Contact Name Primary Telephone # Employer ID # (if known)

Purpose

❑ Unrestricted (Default if no box is checked) ❑ General Operating Expenses ❑ Special Project
❑ Capital Expenditure ❑ Other (e.g "in memory of") _____

Recognition

A letter accompanying your grant will be sent to your selected charity. Please indicate your preference for recognition.

❑ Recognize Fund Name Only (Default if no box is checked)
❑ Recognize Fund Name and Donor (please specify) _____
❑ Anonymous ❑ Other (please specify) _____

Timing

❑ Issue the approved grant on a recurring basis as indicated below for the amount listed above. (Note: Recurring grants may be discontinued for insufficient funds, or if a notice to suspend is received.)

_____/_____/_____ _____/_____/_____ ❑ Quarterly ❑ Semi-Annually ❑ Annually
Beginning (month/day/year) Ending (month/day/year)

3. Acknowledgement of Terms

I understand that this is a recommendation and not a direction. I further understand that National Philanthropic Trust (NPT) reviews all grants to ensure that the organization is a qualified charity under IRS regulations, and that the purpose of the grant is charitable in nature. NPT may deny a recommendation if the grant does not meet criteria for approval. By signing below, I acknowledge that this grant is not intended to:

- Fulfill an existing pledge. (An existing pledge is one made before this grant has been approved by NPT.)
- Acquire more than an incidental benefit, good or service for any specific individual or myself.
- Pay for dues, membership fees, tuition, goods from charitable auction, or other goods or services.
- Support a political campaign or lobbying activity.
- Support an individual.
- Support a private non-operating foundation.

_____ _____
Primary/Joint/Secondary Advisor Signature Date (month/day/year)

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

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