



Donor Application

For Private Foundations and Companies

Complete this form and a "Contribution Agreement for Private Foundations and Companies" to establish a donor-advised fund of \$25,000 or more with National Philanthropic Trust (NPT). A "Corporate/Organization Resolution and Indemnification" form should accompany this form and will remain in effect until NPT is notified in writing that it has been revoked.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.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 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

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

6. Acknowledgement of Terms (This section must be signed by the Authorized Officer.)

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.

Authorized Officer 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