



Contribution Agreement

Please provide a **Contribution Agreement** each time you contribute to your donor-advised fund (DAF) account. You may complete the agreement either by using this form or by logging in to your DAF account at nptgivingpoint.org and selecting *Contribute to Account*. If you are making an initial contribution to establish your DAF, the minimum is \$10,000. National Philanthropic Trust recommends completing this contribution agreement in advance of submitting assets.

If you need assistance, call (888) 878-7900 or email npt@nptrust.org.

1. Donor-Advised Fund Information

Donor-Advised Fund Name

DAF Account Number

2. Asset Ownership Information

Identify all registered owner(s) of the assets being donated. NPT will provide a contribution receipt for federal tax reporting purposes to the person(s) identified. Contribution receipts will be made available on the donor portal.

If the contribution is being made by a Private Foundation or Entity, skip to page 3.

Individual Owner

Prefix First Name MI Last Name Suffix Year of Birth

Street Address City State ZIP

Email Phone

Does the Individual Owner hold a U.S. passport?* Yes No

** Why do we ask this? NPT seeks to verify the identity of each person who makes a contribution to a donor-advised fund at NPT. In accordance with NPT's Know Your Client/Anti-Money Laundering Procedures, we may ask for a copy of a donor's passport or other identifying documents, and we may verify the information we obtain. Additional due diligence is required if the donor does not hold a U.S. passport.*

National Philanthropic Trust (NPT) reserves the right to request a new donor-executed contribution agreement if the contribution is not received within 120 days of submission of the original form.

2. Asset Ownership Information (continued)

Joint Owner

Prefix First Name MI Last Name Suffix Year of Birth

Street Address City State ZIP

Email Phone

Does the Joint Owner hold a U.S. passport?* Yes No

Trust

For contributions from a trust, the trustee(s) must sign this **Contribution Agreement** and provide either a copy of the trust agreement or a trust certification that identifies all trustees and confirms the authority of the trustee(s) to make distributions from the trust to NPT. NPT's **Trust Certification** form may be used for this purpose.

Name of Trust Agreement Tax ID number/EIN (last 4 digits only) Year of Trust

Street Address City State ZIP

Email Phone

Trustee 1

Prefix First Name MI Last Name Suffix Title

Street Address City State ZIP

Email Phone

Does Trustee 1 hold a U.S. passport?* Yes No

Trustee 2

Prefix First Name MI Last Name Suffix Title

Street Address City State ZIP

Email Phone

Does Trustee 2 hold a U.S. passport?* Yes No

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2. Asset Ownership Information (continued)

Entity Owner

Entity Name Tax ID number/EIN Year of Organization

Street Address City State ZIP

Email Phone

Authorized Signatory

Prefix First Name MI Last Name Suffix Title

Street Address City State ZIP

Email Phone

Does the Authorized Signatory hold a U.S. passport?* Yes No

Grant or Transfer from a Donor-Advised Fund

If this contribution is coming from another donor-advised fund, enter the transferring institution or DAF sponsor information below.

Transferring Institution / DAF Sponsor Name Estimated Dollar Amount \$

Account # at Transferring Institution Wire ID (if known)

By Check
By Wire

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3. Contribution Asset Information

Stocks / Bonds / Mutual Funds / ETFs

IMPORTANT: NPT will not initiate the transfer of assets. The asset transfer must be initiated by the institution where the asset is currently held. Please note that the external custodian currently holding the assets may require that you submit a **Letter of Instruction** to initiate the transfer of the assets; if so, please present originals of the completed **Letter of Instruction** to the external custodian and not to NPT.

IMPORTANT: If you're contributing securities, bonds, or mutual funds, please complete the section below. If you're contributing restricted securities contact NPT at (888) 878-7900 or npt@nptrust.org for further guidance. A member of our Donor Relations Team will forward to you a Restricted and Control Stock Questionnaire that **must be completed prior** to NPT accepting your contribution.

IF YOU ANSWER "YES" TO THE ANY OF THE QUESTIONS BELOW, please check "Yes" in the "Restricted/Control" column relative to the specific securities in **the table on the next page**.

- 1. Are any of the securities that you are donating pursuant to this agreement restricted or control securities (as defined in Rule 144 of the US Securities Act of 1933, or the "Securities Act"), and as a condition to future sale into the public market, subject to: (a) reliance on an exemption pursuant to any of Rules 144, 145, or 701 or Regulation S of the Securities Act, or (b) an effective Securities Act registration statement?**
Yes No
- 2. Are any of the securities that you are donating pursuant to this agreement subject to any contractual restrictions on donation and/or sale (e.g., lock-ups, restrictions on who may own the securities, bespoke requirements for transfer)?**
Yes No
- 3. For any of the securities below, are you or have you been at any point in the last 90 days: an officer, director, 10% shareholder (or otherwise a Rule 144 "affiliate") of the issuer of the securities?**
Yes No
- 4. For any of the securities listed below, are you subject to the issuer's insider trading policies and/or regulatory black-out periods?**
Yes No
- 5. Were any of the securities listed below acquired in other than open market purchases and either (a) not fully paid for at the time of acquisition or (b) held by you for a period of less than one year?**
Yes No

TRANSFER FUNDING INSTRUCTIONS:

All Depository Trust Company —
eligible and free transactions
should be directed to:

Brokerage Firm: UBS Financial Services

For Benefit of: National Philanthropic Trust

Depository Trust Company (DTC) #: 0221

Account (A/C) Title: National Philanthropic Trust

Account (A/C) #: UT51093

For Further Credit (FFC) Account (A/C) Title: National Philanthropic Trust

For Further Credit (FFC) Account (A/C) #: UT51093

3. Contribution Asset Information (continued)

Cash (Wire)

Dollar Amount \$

Wire ID (if known)

Transferring Institution

Account # at Transferring Institution

Send Wire to:

Bank: UBS AG

American Bankers Association (ABA) #:

026007993

Account (A/C) Title: UBS Financial Services

Account (A/C) #: 101-WA-258641-000

For Further Credit (FFC) Account (A/C) Title:
National Philanthropic Trust

For Further Credit (FFC) Account (A/C) #:
UT51093

Please Note:

It is essential to include all details of these wire instructions in order to properly initiate the transfer of asset(s). Omitting details could delay processing.

Will any portion of your gift originate from a bank account outside of the U.S? Yes No

Check

Check Amount \$

Check Number

Make payable to: National Philanthropic Trust

Note: On your check memo line, please include your DAF name and account number.

Mail check with Contribution Agreement form to:

National Philanthropic Trust

165 Township Line Road, Suite 1200

Jenkintown, PA 19046

Tax ID#: 23-7825575

Other Non-Cash Assets & Cryptocurrency

Description of Asset

Further documentation will be required. For assistance, please call National Philanthropic Trust at (888) 878-7900.

4. Acknowledgement of Terms

I understand that my gift of the property described in Section 3 is an irrevocable and unconditional contribution when received and accepted by NPT, and that NPT retains exclusive legal control over contributed assets.

By signing below I represent that I will, and undertake to, comply with and fulfill all of my obligations under applicable laws, regulations and any corporate insider trading policies or procedures to which I may be subject, and will not breach such applicable laws, regulations or policies and procedures with respect to any contribution to a DAF. I represent that as of the date of this agreement, unless I have informed NPT in writing, I am not in possession of any material non-public information with respect to any such contributed securities. Further, I represent that (i) I will not make any investment recommendation at a time when I am in possession of any material non-public information with respect to such securities and (ii) I will inform NPT in writing if I am in possession of material non-public information with respect to securities and/or their issuer at the time I transfer or direct a transfer of such securities to NPT. I also agree to provide NPT promptly with all information necessary for NPT to perform its obligations under applicable laws and regulations. I understand that NPT will implement procedures that will limit the sale of contributed securities if I am in possession of material non-public information at the time of transfer.

By signing below, I understand and agree that NPT, in its sole discretion, may decline to accept certain restricted or control securities and/or may decline to accept a contribution until NPT has conducted due diligence on the contribution transaction. I further agree to provide, without cost to NPT, all documentation required by NPT to complete due diligence on my contribution. Furthermore, I acknowledge and agree that there may be a time delay in NPT's processing and acceptance of my contribution as a result of the due diligence process.

I acknowledge that I have read NPT's ***A Guide to Your Donor-Advised Fund*** 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 contribution agreement is accurate and I will notify NPT in writing of any changes. Additionally, I understand, in accordance with NPT's Know Your Client/Anti-Money Laundering Procedures, that NPT may obtain, record and verify information that identifies each person who makes a contribution to a donor-advised fund at NPT.

Individual Owner/Trustee 1/Authorized Signatory Signature

Print Name

Date (MM/DD/YYYY)

Trustee 2 Signature (if applicable)

Print Name

Date (MM/DD/YYYY)

RETURN THIS COMPLETED FORM BY MAIL OR EMAIL TO: National Philanthropic Trust

165 Township Line Road, Suite 1200, Jenkintown, PA 19046 | npt@nptrust.org