



National Philanthropic Trust

Your partner in giving

# Donor Application

For Legal Entities

Please complete this form and a **Contribution Agreement** to establish a donor-advised fund with National Philanthropic Trust (NPT). Refer to **A Guide to Your Donor-Advised Fund** for an overview of the program and policies. Before submitting, please attach the Entity Officer Resolution referenced in Section 4.

If you need assistance, call (888) 878-7900 or send an email to [npt@npitrust.org](mailto:npt@npitrust.org).

## 1. Name Your Donor-Advised Fund

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. Entity Information

Identify the organization (the "Entity") establishing this donor-advised fund.

Entity Name

Street Address

City

State

ZIP

Email

Phone

### Entity Type (please select one)

Nonprofit Corporation

Corporation

Partnership

LLC

Other (please explain)

### 3. Authorized Individuals

Identify up to two individuals who are authorized by the Entity to transact business with NPT on behalf of the Entity. Each individual identified below will have the authority, acting alone, to view all donor-advised fund information, recommend grants and investments, and sign contribution agreements and other documentation related to the donor-advised fund on behalf of the Entity. Each individual will remain an Authorized Individual to the donor-advised fund until such time as NPT receives written notice from an officer of the Entity revoking this authorization.

Prefix	First Name	MI	Last Name	Title
Email			Phone	

Prefix	First Name	MI	Last Name	Title
Email			Phone	

### 4. Officer Certification

**Note:** An officer of the Entity must complete this Certification and provide NPT with a resolution or other Entity document evidencing their appointment as an officer of the Entity (the “**Entity Officer Resolution**”).

By signing below, I certify that:

- I am an officer of the Entity and have the authority to make all representations contained here.
- Each individual appointed as an Authorized Individual in Section 3 has the authority, acting alone, to transact business with NPT on behalf of the Entity. This authority includes, without limitation, the ability to access all donor-advised fund information, recommend grants and investments for the donor-advised fund, and sign contribution agreements and other documentation related to the donor-advised fund on behalf of the Entity.
- The Entity hereby releases and discharges NPT and its directors, officers, employees, and agents from and against any and all claims and/or liabilities in any way relating to, arising out of, or resulting from instructions believed by NPT to have originated from any Authorized Individual.
- This Certification will remain in full force and effect and may be relied upon by NPT until such time as NPT receives written notice from an officer of the Entity revoking this Certification. The revocation will not affect any action taken by NPT before it has had a reasonable amount of time to act upon the revocation.

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Certifying Officer Signature	Date (MM/DD/YYYY)
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Prefix	First Name	MI	Last Name	Title
Email			Phone	

## 5. Recommend an Investment Allocation

Before recommending an investment allocation, please review the ***Investment Descriptions and Performance*** document. This step is not required to establish your new DAF and may be completed at a later date. If no investment allocation is selected at the time a new account is funded, contributed assets will be allocated to the Select Government Preferred Fund (SGPXX).

### Model Portfolios

If Model Portfolios are chosen, the total allocation on this form must equal 100%. Each selection must reflect a minimum allocation of 25%.

**Impact Portfolios:** Using industry-leading mutual funds, exchange-traded funds (ETFs), separately managed accounts (SMAs) and/or alternative investment funds.

% Equity and Inclusion – *Seeks to narrow inequalities in society by creating economic opportunity that advances equity and inclusion*

% Environmental Stewardship – *Manages climate change risks and protects and conserves natural resources. Moderate risk profile*

% Gender Lens – *Supports the advancement of women in the workplace and beyond. Moderate risk profile*

% Broad Social Impact – *Advances solutions to global challenges, including conservation, financial inclusion and access to healthcare. Growth risk profile*

**Actively Managed Portfolios:** Using industry-leading mutual funds.

% Conservative Portfolio

% Moderate Portfolio

% Growth Portfolio

**Index Fund Portfolios:** Using low-cost ETFs.

% Conservative Index Portfolio

% Moderate Index Portfolio

% Growth Index Portfolio

### Money Market Portfolios

% Select Government Preferred Fund (SGPXX)

% Select Treasury Preferred Fund (STPXX)

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## 100% TOTAL

### Segregated Account – Financial Advisor Managed

Donors with accounts over \$500,000 may recommend that a qualified financial advisor manage the DAF investments in a segregated account on a discretionary basis. For non-discretionary accounts, the minimum is \$2 million. To establish an NPT segregated account, have your financial advisor contact NPT at (888) 878-7900 or [npt@nptrust.org](mailto:npt@nptrust.org) for the appropriate paperwork. NPT also offers access to certain private impact investment opportunities for segregated accounts. If you are interested in learning more about our Customized Impact Investment offering, please visit [nptrust.org](http://nptrust.org).

**Please Note:** NPT's ***Investment Policy Guidelines*** apply to all segregated accounts. Non-traditional investments such as alternative or private investment funds are subject to certain investment minimums. For more information about minimums and fees for segregated accounts, please see ***A Guide to Your Donor-Advised Fund***.



