National Philanthropic Trust

A Season for Generosity.
An Opportunity for Impact.

Planning Opportunities for Donors Considering their Next Charitable Step

The giving season invites us to pause, reflect on what matters, and consider where our generosity can do the most good.

This year, that pull meets real opportunity. Markets have rewarded patience. New tax rules have changed the math on generosity. And a growing number of people are recognizing that important moments in their financial lives — strong market performance, a business sale, a windfall — can also create meaningful opportunities for giving with smart planning.

That is precisely the opportunity a donor-advised fund with National Philanthropic Trust creates: a way to act on generosity today, on your own terms, while the moment is in front of you.

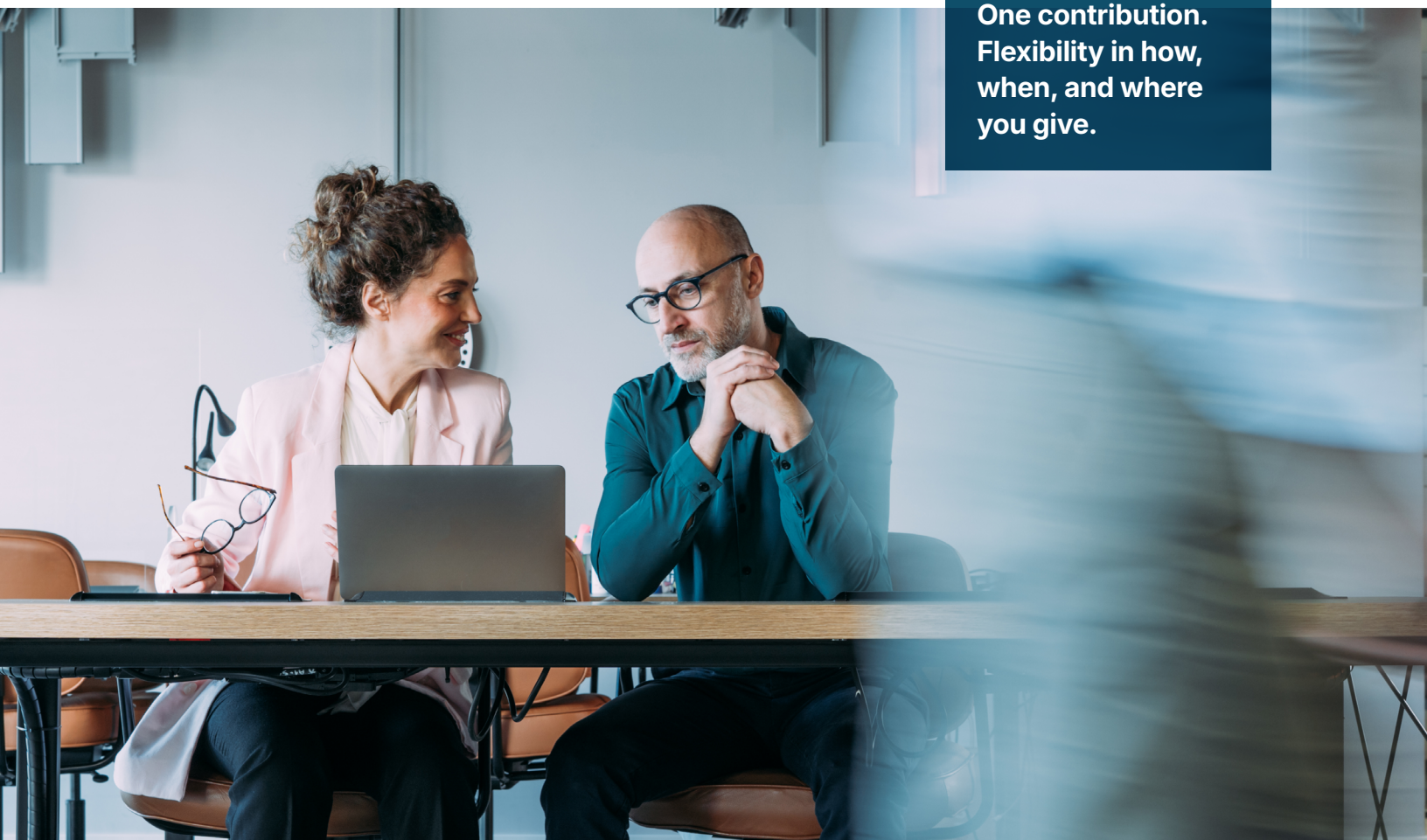
About National Philanthropic Trust
National Philanthropic Trust brings independence, scale, and philanthropic expertise to DAFs, helping donors with sophisticated giving needs and complex financial lives move from intention to impact.

HOW A DAF WORKS

A donor-advised fund (DAF) follows a simple three-step process:

1. **You contribute.** Give cash, securities, or other eligible assets to your DAF and receive an immediate charitable tax deduction.
2. **Your gift is invested.** Contributions can be invested and may grow tax-free, increasing the resources available for future grantmaking.
3. **You grant with purpose.** Recommend grants to IRS-qualified charitable organizations when you're ready, whether that's next month, next year, or over a lifetime.

One contribution. Flexibility in how, when, and where you give.



One Account. Multiple Possibilities.

A DAF gives you a flexible way to organize your charitable giving. National Philanthropic Trust adds the experience, capabilities, and personal support to help that flexibility grow with your philanthropy.

What You Want	A DAF Gives You	What NPT Adds
Tax-smart giving	An immediate charitable deduction when you contribute. Appreciated assets may be eligible for a fair market value deduction, with no capital gains tax due on the donated appreciation.	Deep expertise accepting complex assets, including closely held business interests, restricted stock, and real estate.
Freedom to give your way	Give now, decide later: recommend grants to any IRS-qualified charitable organization, on your own timeline, as your passions evolve.	Independence from any single institution or cause. Your philanthropy isn't limited to the organizations or priorities of your DAF sponsor.
Assets that keep working for you	The ability to invest contributions before recommending grants.	Model portfolios for hands-off investing, plus the option for your own financial advisor to manage your DAF's investments once the fund reaches a qualifying minimum balance, including access to alternatives and private funds.
Family and legacy	The ability to involve family members in grant decisions and establish a plan for the future of your fund.	A Philanthropic Advising team, available on a project basis, with the expertise to help translate your intent into a lasting plan for your giving and your family. For accounts of significant scale, NPT's Premier Donor Services and Family Office & Private Client Practice provide a dedicated, concierge-level relationship team.
Simplicity and reach	One place for every contribution, grant, and receipt, so you spend less on paperwork and more on the causes that matter to you.	GivingPoint, NPT's secure, intuitive donor portal, backed by a dedicated service team and the reach to fulfill your philanthropic goals locally, nationally, or globally. NPT has processed more than 1 million grants totaling over $55.5 billion to nonprofits around the world.

How One Financial Milestone Became a Family Giving Tradition

When her company went public, one founder saw the moment as more than a milestone for her balance sheet. Her philanthropic goal was to use that moment to make a lasting difference to the causes she cared about while creating a giving tradition her family could share.

Before the shares began trading, she contributed a portion of them to a DAF, creating opportunity for a charitable deduction and avoiding capital gains tax on the sale of the donated stock. A single financial event became a source of charitable capital that could support her giving for years to come.

> **She also wanted her philanthropy to become something her family could help shape.**

She named her spouse as a Joint Advisor, giving them equal say in grant and investment decisions. She named her two adult children as Secondary Advisors, inviting them to participate in the family's giving.

Each year, the family gathers to decide where their DAF account resources should go next.

Her daughter supports environmental causes. Her son supports educational equity. Her spouse supports medical research. And she gives to a small-business incubator in the community where her company began.

One IPO. One DAF account. A shared tradition of giving.

The financial milestone was hers. The difference it could make became something the whole family could help shape.

WHAT WILL YOUR STORY BE?

A stock position that's quietly grown for years, now able to support the causes you care about.

A family that wants to make a difference together, not simply leave something behind.

A milestone year that could become the beginning of a lasting tradition.

A cause you've supported quietly, now ready for a more intentional approach.

A Season for Generosity. A Moment to Act.

Whatever this season looks like for you, a DAF can give you a place to start and the flexibility to decide where your philanthropy goes next.

With NPT, you can:

1. **Open your DAF**
   Register on GivingPoint, NPT's secure online donor portal, and complete your donor application.
2. **Make it yours**
   Name your fund, add advisors, choose an investment strategy, and establish a legacy plan.
3. **Fund your giving**
   Contribute, securities, or other eligible assets.

To be eligible for a 2026 charitable tax deduction, **NPT must receive your contribution by December 31, 2026.**

Gifts in transit as of January 1, 2027, will not qualify for a 2026 deduction.

Ready to explore what's possible?
Visit **nptrust.org**, email **npt@nptrust.org**, or call **(888) 878-7900**



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