



National Philanthropic Trust

NPT Donor-Advised Fund for UBS

GIVINGPOINT

# Experience a Better Way to Give

A look inside GivingPoint, your new donor portal

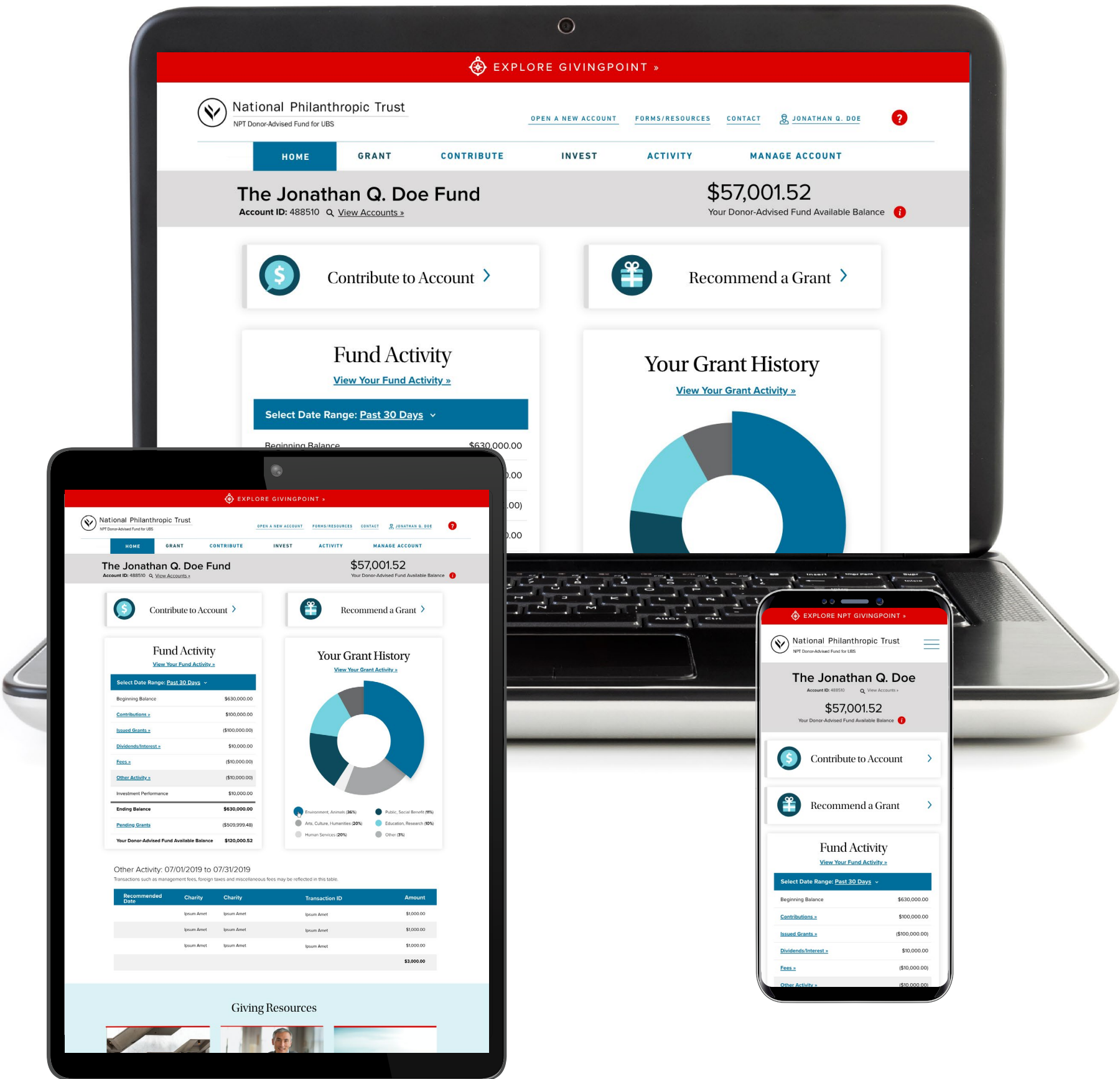
We're proud to bring you an online donor-advised fund experience that is responsive, innovative and secure. GivingPoint is designed for UBS clients to provide you with intuitive function and a bold new look — powering your charitable purpose with new technology.

You want to give. We're proud to make giving easier.

# Bolder, faster and mobile

The fresh new look of the donor portal—now called GivingPoint—only scratches the surface of the enhancements we’ve made. Pages load faster and are simple to navigate, making the portal easier to use for donors and their trusted advisors.

A modern, mobile user experience allows you to recommend grants, contribute directly to your donor-advised fund (DAF) using a credit card, check your account balance and perform all other functions right from your mobile device.



### Crisp, Clean Design

GivingPoint modernizes the look and feel of the donor portal.

Bright colors, bold headers, and dynamic tables and charts offer an updated visual experience.

The home page provides a comprehensive overview of your DAF account activity, allowing you to gather necessary information at a glance or take action with the click of a button.


### Fast, Easy Navigation

GivingPoint was designed with on-the-go donors and advisors in mind. Each page is mobile-responsive, allowing you to access your DAF account from your personal device without sacrificing quality of experience. Our new technology ensures that page load is faster than ever before.

We reorganized the menus and added text to make it easier and more intuitive to find the resources you need to optimize your giving.

✓ Navigation is easier and more intuitive.

Next >

 Look for this **help text icon** when you need additional information.

Easy to follow progress icons.



### Action-Oriented Functionality

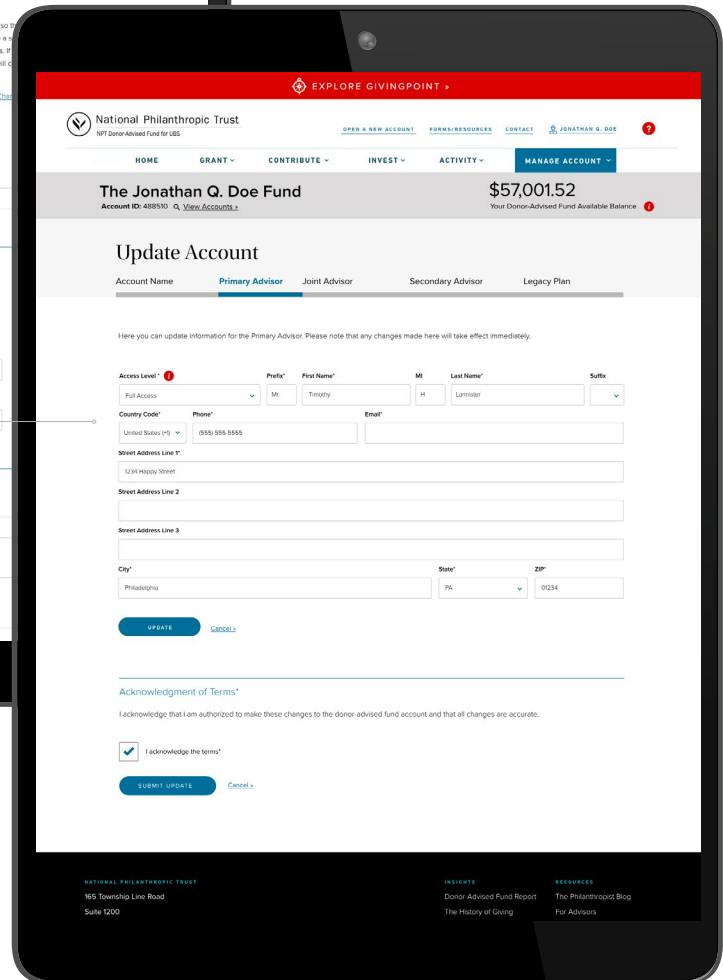
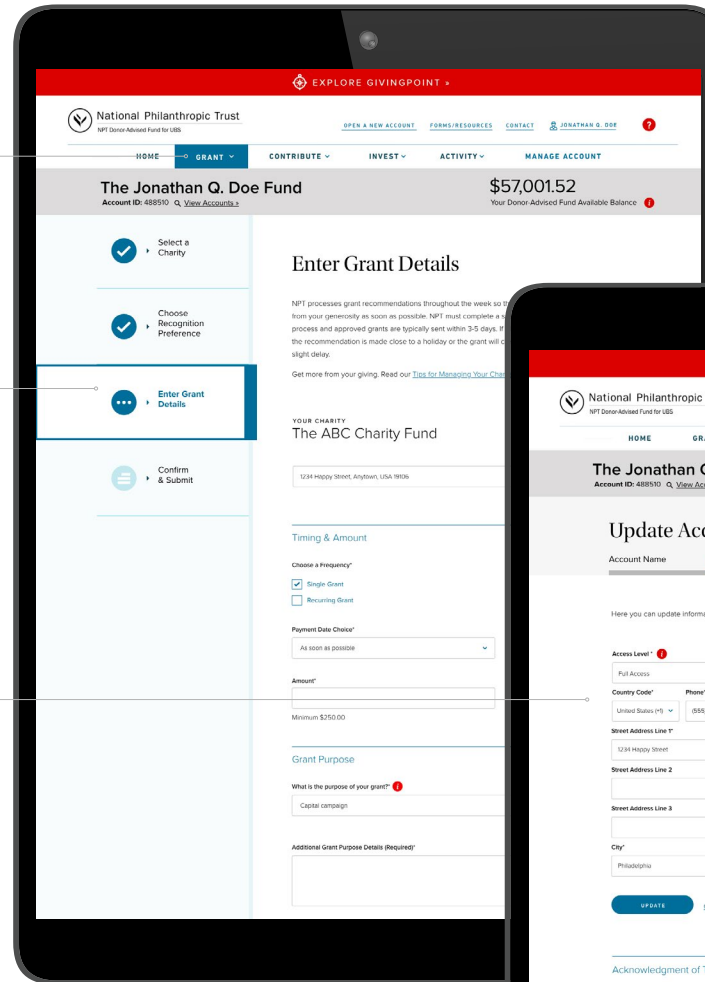
GivingPoint streamlines access to our most commonly-used online functionalities — Grant, Contribute and Invest — and provides a left-side, vertical “breadcrumb trail” to help orient you to where you are in the process.

### Simple Account Management

GivingPoint gives you the ability to manage your DAF account at any time online.

In addition to being able to recommend grants and submit investment reallocations, you can now use the portal to:

- initiate a contribution agreement
- add and edit DAF account relationships
- change your contact information and preferences
- update your Legacy Plan



## Enjoy the Experience

These changes will provide you with a more seamless giving experience, making it easier than ever to support the causes you care about most.

If you have any questions about the new technology and how GivingPoint could change the way you use your donor-advised fund, please reach out to us at [donoradvisedfund@nptrust.org](mailto:donoradvisedfund@nptrust.org) or at (877) 277-3191.

*We are proud to be your partner in giving.*