



National
Philanthropic
Trust

Your partner in giving

Funding & Transfer Instructions

Outlined below are the steps for making a new or additional contribution to your National Philanthropic Trust (NPT) donor-advised fund (DAF). This document summarizes all relevant processes and transfer instructions for contributions of various asset types. Please note that we cannot accept contributions in the form of ACH transfers.

With the exception of credit card contributions, the first step is to submit a **Contribution Agreement**. You may complete this process online at nptgivingpoint.org.

Funding Your Account

Step 1

Notify NPT by submitting a **Contribution Agreement** either online at nptgivingpoint.org or by submitting a paper form along with other required documentation via mail, email, or fax to:

National Philanthropic Trust
2 Ash Street, Suite 3000
Conshohocken, PA 19428
npt@nptrust.org
Fax: (215) 277-3029

Step 2

Initiate a transfer from the account where assets are currently held. Complete any transfer paperwork required by the delivering firm and provide them with these Funding Instructions.

Important Notes:

All contributions must be made to the contribution receipt account owned by NPT using the instructions below. After receipt by NPT, the contribution(s) will then be posted by NPT to the individual donor's DAF account.

Credit Card	Online: You can make a contribution with a credit card through GivingPoint. <i>Please note, there is a 3% processing fee for credit card contributions.</i>	
Cash by Wire	Wire to Bank: UBS AG American Bankers Association (ABA) Number: 026007993 Account (A/C) Title: UBS Financial Services Account (A/C) Number: 101-WA-258641-000 For Further Credit (FFC) Account (A/C) Title: National Philanthropic Trust For Further Credit (FFC) Account (A/C) Number: UT51093	
Cash by Check	Make payable to: National Philanthropic Trust Include on check memo: Donor-advised fund name and account number Tax ID#: 23-7825575 Mail check via USPS to: Chicago Lockbox NPT Donor-Advised Fund Programs P.O. Box 7412735 Chicago, IL 60674-2735	Mail check via FedEx, UPS, etc. (Non-USPS) to: Bank of America Lockbox Services National Philanthropic Trust 12735 540 W. Madison, 4th Floor Chicago, IL 60661

Stock, Bonds, Mutual Funds and ETFs*	Transfer to: Brokerage Firm: UBS Financial Services For Benefit of: National Philanthropic Trust Depository Trust Company (DTC) Number: 0221 Account (A/C) Title: National Philanthropic Trust Account (A/C) Number: UT51093 Please note: Gifts of mutual funds can take 4–6 weeks to complete.
Restricted Stock	Please contact NPT at (888) 878-7900 for assistance. Processing this type of asset can take 4–6 weeks to complete.
Cryptocurrency	Please contact NPT at (888) 878-7900 and ask to speak to a cryptocurrency specialist.
Alternative Investments (e.g. hedge fund and private equity)	Please contact NPT at (888) 878-7900 for assistance. Please note, minimums apply; please see the Illiquid Asset Contribution Guidelines for details.
Stock Certificates	Mail Physical Certificate and Irrevocable Stock or Bond Power with medallion guarantee under separate cover to: National Philanthropic Trust 2 Ash Street, Suite 3000, Conshohocken, PA 19428

** If gifting stocks, bonds, mutual funds or ETFs, 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.*