



National
Philanthropic
Trust

Your partner in giving

How to Open a DAF Account Online

NPT GivingPoint—National Philanthropic Trust’s donor portal—allows you to open, manage, update and administer your own donor-advised fund (DAF) account from the convenience of your personal device. This tutorial will guide you through the process of registering a new account with NPT GivingPoint and completing an application to establish your new DAF.

If you have already registered as a new user, skip ahead to **OPEN A NEW DONOR-ADVISED FUND ACCOUNT** on page 2.

TO BEGIN: Visit the donor portal at nptgivingpoint.org. You will need to set up a new account before you can log in. To do so, click the **Register as a New User** button.

REGISTER AS A NEW USER

To register, you’ll need your name, year of birth, mailing address, phone number and a valid email address.

Fill out the registration form as prompted. Required fields will be marked with an asterisk. Set a user ID and password that meets the requirements listed.

Indicate your preference to receive a Verification Code either by text, or by phone via an automated voice call reading off your code. Note that if you choose to receive the code via text, it may come from a five-digit phone number (e.g. 123-45). Be sure you are entering the six- or seven-digit verification code, which will appear without hyphens, and not the phone number from which the code is sent.

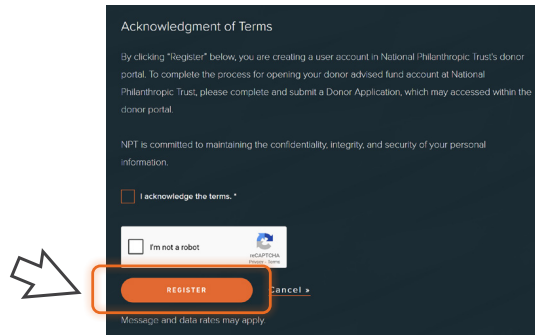
When the form is complete, acknowledge the terms at the bottom of the form using the checkbox. Check the CAPTCHA box to verify that you are a human.

Then click **Register**.

Once you have received the verification code, enter it on the next screen of the registration form and click **Continue**.

OPEN A NEW DONOR-ADVISED FUND ACCOUNT

Once you have verified your identity using your verification code, use the drop-down menu to indicate whether you will be the primary advisor to the new DAF or whether you are a financial advisor working on behalf of the primary advisor. Click **Open an Account** to start the process.




Acknowledgment of Terms

By clicking "Register" below, you are creating a user account in National Philanthropic Trust's donor portal. To complete the process for opening your donor advised fund account at National Philanthropic Trust, please complete and submit a Donor Application, which may accessed within the donor portal.

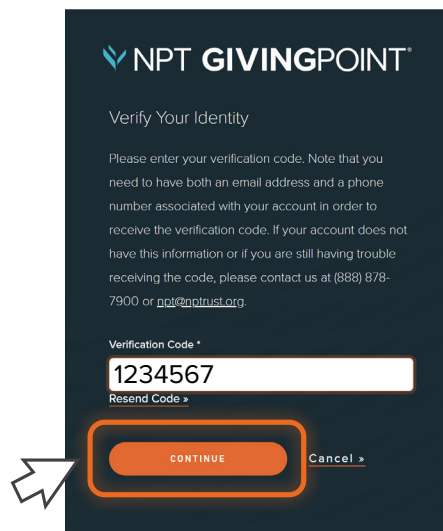
NPT is committed to maintaining the confidentiality, integrity, and security of your personal information.


☐ I acknowledge the terms. *

☐ I'm not a robot 

REGISTER [Cancel >](#)

Message and data rates may apply.



 **NPT GIVINGPOINT**

Verify Your Identity

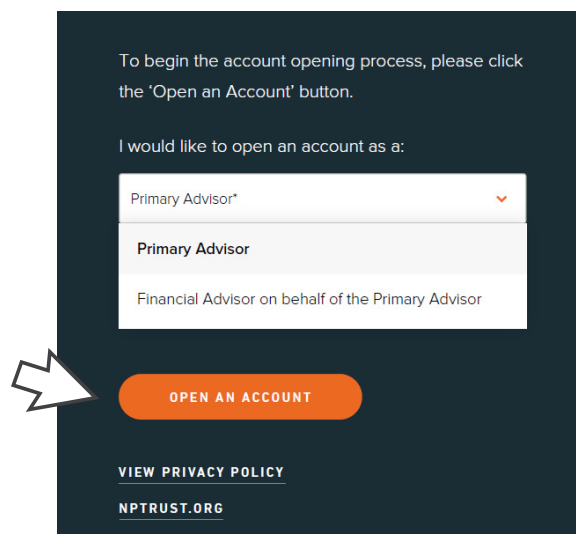
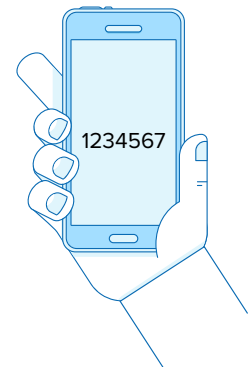
Please enter your verification code. Note that you need to have both an email address and a phone number associated with your account in order to receive the verification code. If your account does not have this information or if you are still having trouble receiving the code, please contact us at (888) 878-7900 or npt@nptrust.org.

Verification Code *

1234567

[Resend Code >](#)

CONTINUE [Cancel >](#)



To begin the account opening process, please click the 'Open an Account' button.

I would like to open an account as a:

Primary Advisor*

Primary Advisor

Financial Advisor on behalf of the Primary Advisor

OPEN AN ACCOUNT

[VIEW PRIVACY POLICY](#)

NPTRUST.ORG



► **Name
Your DAF**

NAME YOUR DAF

First, name your new donor-advised fund.

Click **Next** at the bottom of the page to continue.



► **Name
Advisors**

In this section, you can name advisors to the DAF.

PRIMARY ADVISOR

If you are the primary advisor, the fields in this section will be autofilled using the information associated with your NPT GivingPoint account.

JOINT ADVISOR

To add a joint advisor, click the plus sign to expand the section and fill in their information in the menu that is revealed. Required fields will be marked with an asterisk. If the joint advisor has the same address as the primary advisor, you can click **Copy from Primary Advisor Address** to duplicate address information.

SECONDARY ADVISORS

For secondary advisors, click the plus sign to expand the section. Please note that secondary advisors do not succeed the primary and joint advisors unless they are also listed as individual successors in the Legacy Plan (see page 4).

Use the drop-down menu to specify the level of access to the DAF account your secondary advisor will have. Fill in their information. When you click **Add**, your secondary advisor will appear in the table. You can either click **Add Another Secondary Advisor** to include another individual on the DAF account or click **Next** to continue.

Name Your DAF

Welcome to the account opening process for your new donor-advised fund (DAF). For your convenience, we have indicated which steps are required. The steps indicated as optional—naming joint and secondary advisors, adding a financial advisor, recommending an investment allocation and establishing a Legacy Plan—may be completed at a later date.

Name Your Donor-Advised Fund*

Jonathan Q Doe Fund

Please refer to [A Guide to Your Donor-Advised Fund](#) for an overview of the program and policies. The guide includes important details about creating and maintaining your DAF.

Name Advisors

On this page, you will name advisors to your DAF. Naming a primary advisor is a required step. The primary advisor is typically the primary donor and has full access to the account.

Optionally, you may also name a joint advisor—who will have access similar to the primary advisor—and/or secondary advisors, who have grantmaking authority. These are not required to establish your new DAF, so you may skip this step and name these additional advisors at a later date. After your DAF account has been established, go to Manage Account in the navigation menu and select Update Account to complete this step.

Primary Advisor (Required)

The primary advisor is typically the primary donor to the donor-advised fund. The primary advisor may recommend grants and asset allocations, view fund information and name successors. The primary advisor may designate a joint advisor who will have the same level of access to and involvement with the donor-advised fund.

Joint Advisor (Optional)

Secondary Advisors (Optional)

You may name one or more individuals (such as a relative or friend) as a secondary advisor. Secondary advisors will not succeed the primary nor joint advisors unless specifically named as successors.

Access Level*

Please Select

Prefix

First Name*

Middle Initial

Last Name*

Suffix

Year of Birth*

Country Code

Phone*

Email Address*

United States of America

XXX-XXX-XXXX

Street Address Line 1* **Copy From Primary Advisor Address**

Street Address Line 2

Street Address Line 3

City*

State*

Zip*

Country*

Please Select

United States of America

ADD

Cancel

Action	Name	Access Level
Edit Remove	Jack Doe	Read-Only Access
Edit Remove	Jane Doe	Full Access
<div>ADD ANOTHER</div>		



Create a
Legacy Plan

In this section, you can create a Legacy Plan for how you would like your DAF assets to be handled beyond your lifetime.

This online form allows you to name individual successors—who will succeed you in an advisory capacity on the DAF—and/or charitable beneficiaries, organizations that will receive grants made from your DAF upon your death. Other Legacy Plan options include endowment and specialized legacy plans; these cannot yet be activated online and must be completed via a paper form.

If you are interested in these options but are not ready to create your Legacy Plan now, click **Skip and Complete Later** to move on to the next section.

INDIVIDUAL SUCCESSORS

To add an individual successor, use the drop-down menu; your secondary advisors will be available to select, or you can select **Add New** to reach a menu where you can enter information for a different individual.

Be sure to allocate the percentage of your DAF assets that you would like the individual to advise in a new DAF upon activation of your Legacy Plan. Click **Add to Plan** and your selection will appear in the Legacy Plan Summary at the top of the screen.

Create a Legacy Plan

A Legacy Plan allows you to continue giving beyond your lifetime. Identify the people who will succeed you as advisors to the DAF or name the charities that will receive grants from your DAF—or select a combination of plans. We offer options to help you establish the Legacy Plan best suited to carry out your wishes.

[Skip and Complete Later](#) >

To establish your Legacy Plan, please note:

- You may select one or more of the plan options described in the sections below.
- You must allocate 100% of your DAF assets to the combined selected options.
- The Endowment option cannot currently be activated online. If you wish to include an endowment, whether as part of your legacy plan or as the sole option, download the [update form](#) to indicate the entirety of your legacy plan. You may then advance to the next section of this online application via the Skip and Complete Later link.
- For a Custom Legacy Plan, skip to the appropriate section for instructions on how to proceed.

Action	Name	Designation
Edit Remove	Jonathan Q Doe	Individual Successor
Remaining Allocation		0%
TOTAL		100%

Individual Successors

This option allows you to designate trusted friends or family members to succeed you in an advisory capacity on your donor-advised fund account. You may name up to four people as individual successors. Each person named will become the Primary Advisor of a new DAF account which will be funded from the remaining assets in your DAF account, based on the percentage allocation you indicate here. Individual successors must be at least 18 years of age at the time of Legacy Plan activation.

Choose Successor

Jonathan Doe

Jane Doe

Add New

Allocation %*

Choose Successor

Add New

Allocation %*

Prefix

First Name*

Middle Initial

Last Name*

Suffix

Year of Birth*

Country Code

Phone*

Email Address*

Street Address Line 1*

Street Address Line 2

Street Address Line 3

City*

State*

Zip*

Country*

ADD TO PLAN

[Cancel](#) >

CHARITABLE BENEFICIARIES

To add a charitable beneficiary, click **Find a Charity**. Use the search functions to enter information about the organization you are looking for. To select a charity from the results, click **Select**.

After you select an organization, you will see it reflected in the Charitable Beneficiaries section. Allocate a percentage of your DAF assets to this beneficiary and click **Add to Plan**. If you wish to add another charitable beneficiary, repeat the process.

The beneficiaries you add to your plan will appear in your Legacy Plan Summary table at the top of the page.

ENDOWMENT AND CUSTOM PLANS

The online form summarizes some of the Legacy Options available through NPT that cannot currently be activated online.

If you would like to include an endowment component as part of your plan, you can click **Download Form** to access a PDF application. Skip this section of the online form, but complete the PDF and submit it to NPT to create your new Legacy Plan.

If you are interested in a customized option, skip this section of the online form and contact NPT to discuss the possibilities for your Legacy Plan.

FINISHING THE LEGACY PLAN

Review your Legacy Plan Summary table. You can use the action links to edit or remove components of your plan. The percentages designated to each component of your Legacy Plan must total 100 percent before you may proceed.

Click **Next** to move to the next section.

Charitable Beneficiaries

You may designate one or more charities to receive all or a portion of your DAF assets as a one-time payment.

FIND A CHARITY

You may designate one or more charities to receive all or a portion of your DAF assets as a one-time payment.

Charitable Beneficiary Legal Name

XYZ Charity Group

Allocation %*

ADD TO PLAN

[Cancel »](#)

Endowment Program

The Endowment option allows to you designate one or more charitable beneficiaries to receive support in the form of a recurring grant. DAF accounts with minimum charitable assets of \$100,000 are eligible to establish an endowment.

This option cannot currently be activated online. If you wish to include an endowment, whether as part of your Legacy Plan or as the sole option, download the form below. You may complete this form to indicate the entirety of your Legacy Plan and submit it to NPT using the instructions provided.

DOWNLOAD

Custom Legacy Plan

Custom Legacy Plans cannot currently be activated online. If you wish to establish a Legacy Plan that extends beyond NPT's standard options, you may contact NPT to discuss creating a custom Legacy Plan. Please contact us at npt@nptrust.org or (888) 878-7900.

Legacy Plan Summary

Action	Option	Name	%
Edit Remove	Individual Successor	Jonathan Doe	25%
Edit Remove	Individual Successor	Jane Doe	25%
Edit Remove	Charitable Beneficiaries	XYZ Charity	50%
TOTAL			100%

Next >




Select an
Investment
Allocation

In this section, you will indicate how you would like your DAF assets to be invested. To get started, click the link at the top of the page to view a PDF summarizing your options.

STANDARD MODEL PORTFOLIO INVESTMENTS

To invest in NPT's standard model portfolio offerings, simply enter a percentage allocation next to the funds and portfolios in which you would like to invest.

You can click on the "information" icon  to access help tips describing the various portfolio types.

Note that your total allocation must equal 100% before you can proceed.

SEGREGATED ACCOUNTS

For DAFs of \$500,000 or more, NPT offers segregated accounts, which allow you and your financial advisor to recommend investments other than those that NPT currently offers.

Currently, segregated accounts cannot be activated online. If you wish to open a segregated account, click the plus sign to expand the section, then check the box to indicate your interest. An alert bar will appear letting you know that this selection will clear your above allocations; be sure to click **Yes** if you wish to proceed. After you complete your DAF application, a member of NPT's Donor Relations team will reach out about next steps.


Select an Investment Allocation

Before recommending an investment allocation, please review the [Investment Descriptions and Performance](#) to obtain additional details about NPT donor-advised fund investment strategies, descriptions and benchmark allocations for each option. Each selection must be at least 25% of your total allocation, and

This step is not investment allocation to the UBS Select DAF account has Account.



ated at a later date. If no contributed assets will be allocated our investment allocation after your on menu and select Update

ASSET CLASS	TICKER	ALLOCATION % 
Impact Portfolios		
Equity and Inclusion Portfolio		%
Environmental Stewardship Portfolio		%
Gender Lens Portfolio		%
Broad Social Impact Portfolio		%
Index Fund Portfolios		
Conservative Index Portfolio		%
Moderate Index Portfolio		%
Growth Index Portfolio		%
Actively Managed Portfolios		
Conservative Portfolio		%
Moderate Portfolio		%
Growth Portfolio		%
Money Market Portfolios		
Select Government Preferred Fund (SGPXX)	SGPXX	%
Select Treasury Preferred Fund (STPXX)	STPXX	%
TOTAL:		100%


Segregated Account



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 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 see nptrust.org/customized-impact-investing. 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.

☒ Segregated Account

Checking this will set allocations above to 0%. Do you want to proceed? **Yes** | **No** 



Select an
Investment
Allocation

FINISHING YOUR INVESTMENT ALLOCATION

When you have either allocated 100% of your DAF assets or indicated your interest in a segregated account, acknowledge the terms. Then click **Next** to continue to the next section.

Note that if you do not allocate your investments using this form, your DAF assets will be invested in the Select Government Institutional Money Market Fund.

Acknowledgment of Terms

I am submitting the following initial investment recommendations for my own account or in my capacity as the financial advisor for my client with such authorization for the associated, donor-advised fund. I certify that I have reviewed these options for my own account or, if acting as a financial advisor, with my client(s) and acknowledge my understanding that I am submitting a recommendation and not a direction, and that recommendation is not legally binding on National Philanthropic Trust (NPT). I acknowledge on my own behalf or on behalf of my client that NPT retains exclusive legal control over contributed assets. I further acknowledge that I have reviewed NPT's [A Guide to Your Donor-Advised Fund](#) for my own account or, if acting as a financial advisor, with my client. I certify that, to the best of my knowledge, all information in connection with this recommendation is accurate.



I acknowledge the terms*



Add Financial
Advisor

In this section, you are able to name a financial advisor who you would like to have access to your new DAF account.

Note: if you are a financial advisor opening a DAF on your client's behalf, your information will be prefilled in this section. If you are working with a financial advisor, enter their information here. Be sure to use the drop-down menu to select the advisor's access level: Read-Only, or Full Access.

Click **Next** to continue.

Add Financial Advisor

You may name a financial advisor to your donor-advised fund. A financial advisor may have read-only account access or the authority to recommend investment allocations and recommend grants on behalf of the primary/joint advisors.

Financial Advisor (Optional)

Access Level*

Financial Institution

✓ Please Select

No Access

Read Only

Full Access

Year of Birth*

Country Code

Phone*

Email Address*

Street Address Line 1*

Street Address Line 2

Street Address Line 3

City*

State*

ZIP*

Country*

Is the financial advisor the donor or primary/joint advisor or related to the donor or primary/joint advisor?*

Is the financial advisor the donor or primary/joint advisor or is the financial advisor one of the following relatives of the donor or primary/joint advisor: child, grandchild, great-grandchild, sibling, parent, grandparent, other direct-line ancestor, or the spouse of any of the aforementioned?*

Clear »

[Skip and Complete Later](#) ⓘ

Next >



Confirm
& Submit

The last section of the application will display a summary of the information you have provided so far.

Review it now. If anything looks inaccurate, click **Edit Details** to go back to the appropriate section and make changes.

When everything is in order, acknowledge the terms and click **Submit Account Application**.



A confirmation page will appear where you can download a PDF of your completed application. You, along with any other individuals you listed on the account, will receive emails confirming your new roles.

Your new account will be visible on NPT GivingPoint immediately. You may use the button at the bottom of the page to begin a contribution agreement.

IF YOU HAVE ANY QUESTIONS, reach out to us at npt@nptrust.org or call (888) 878-7900.

Confirm & Submit

Your Advisors

[Edit Details »](#)

Action	Name	Access Level
Edit Remove	Jack Doe	Read-Only Access
Edit Remove	Jane Doe	Full Access

Your Legacy Plan

[Edit Details »](#)

Legacy Plan Summary

Action	Option	Name	%
Edit Remove	Individual Successor	Jonathan Doe	25%
Edit Remove	Individual Successor	Jane Doe	25%
Edit Remove	Charitable Beneficiaries	XYZ Charity	50%
TOTAL			100%

Your Investment Allocation

[Edit Details »](#)

- Broad Social Impact Portfolio (25%)
- Equity and Inclusion Portfolio (25%)
- Environmental Stewardship Portfolio (25%)
- Gender Lens Portfolio (25%)

Your Financial Advisor

[Edit Details »](#)

Acknowledgment of Terms*

I am opening this account on my own behalf or I have been authorized by my client to establish a donor-advised fund account on his/her/their behalf with the National Philanthropic Trust (NPT), a 501(c)(3) public charity, and to serve as the financial advisor to the account. I certify that, to the best of my knowledge, all information enclosed is accurate and I have reviewed for my own account or, if acting as a financial advisor, with my client the terms of the NPT donor guide entitled [A Guide to Your Donor-Advised Fund](#). If acting as a financial advisor, I have informed my client that I will have transactional access to the account and that NPT is authorized to rely on my instructions without further approval or instruction.

☐ I acknowledge the terms.*

You will have an opportunity to download a summary of your account details after you click Submit Account Application.

[SUBMIT ACCOUNT APPLICATION](#)

[Cancel »](#)

Account Confirmation

Thank you for establishing your donor-advised fund with National Philanthropic Trust. The primary advisor and all other named advisors will receive an email confirmation and login instructions. For assistance, please contact NPT's Donor Relations team at (888) 878-7900 or npt@nptrust.org. We are proud to be your partner in giving.

Your Donor-Advised Fund

The Jonathan Q. Doe Fund

Account Number
0123456789

[Download Completed Application »](#)

[CONTRIBUTE TO ACCOUNT](#)

[Back to Home »](#)