



# Bequest Gift Notification

Complete this form along with a Donor Application if you are a new donor to make a bequest of \$5,000 or more from your will, IRA, 401(k) or other qualified plan, trust, or insurance policy upon your death to a new or existing donor-advised fund with National Philanthropic Trust. Additional forms are available at [www.nptrust.org](http://www.nptrust.org). If you need assistance, call toll-free at (888) 878-7900 or send an email to [npt@nptrust.org](mailto:npt@nptrust.org).

## 1. Donor-Advised Fund Information

Donor-Advised Fund Name

Primary Advisor

## 2. Donor Information

Identify all registered owners of the assets being donated. If the donor is a trust, enter the name of the trust agreement, the taxpayer identification number, and the date of the trust agreement directly below. All owners, joint owners, trustees, and co-trustees should complete the rest of Section 2.

### Trust

Name of Trust Agreement

Taxpayer Identification Number

Trust Date (Month, Day, Year)

Donor 1     Mr.  Mrs.  Ms.  Dr.

Owner, Trustee or Officer (First Name, MI, Last Name)

Year of Birth

Street Address

City/State

Zip

Email

Primary Telephone #

Donor 2     Mr.  Mrs.  Ms.  Dr.

Owner, Trustee or Officer (First Name, MI, Last Name)

Year of Birth

Street Address

City/State

Zip

Email

Primary Telephone #

### 3. Type of Gift

Check all boxes that apply to indicate how your gift will be made to NPT upon your death. NPT will place any gift of less than \$5,000 into its General Fund.

- Bequest under a will or codicil
- Distribution from an IRA, 401(k) or other qualified plan
- Distribution from a life insurance policy
- Distribution from trust (e.g. charitable remainder trust)
- Other (please specify) \_\_\_\_\_

Please note the approximate value of your gift \$ \_\_\_\_\_

List any beneficiaries, trustees or other individuals whose interest in your gift precedes that of NPT. List additional names on a separate page.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

### 4. Custodian/Firm Information

Provide information about the firm(s) holding your assets or policy. If you are contributing assets from more than one firm, provide information on a separate page.

\_\_\_\_\_  
Name of custodian or firm

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City/State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Contact Name

\_\_\_\_\_  
Primary Phone #

\_\_\_\_\_  
Account #

\$ \_\_\_\_\_ **OR** \_\_\_\_\_ %  
Dollar Amount                      Percentage of Assets

\_\_\_\_\_  
Description of Assets (e.g. various stocks, mutual fund shares, bonds, etc. Attach pages if necessary.)

**5. Acknowledgement of Terms** (All donors or trustees named in Section 2 must sign below)

I understand that my gift of the property described in Section 4 is an irrevocable and unconditional contribution when received and accepted by National Philanthropic Trust (NPT), and that NPT retains exclusive legal control over contributed assets. I acknowledge that I have read the NPT Donor Guide and agree to the terms and/or conditions contained therein. I certify that, to the best of my knowledge, all information in connection with this contribution agreement is accurate and I will notify NPT in writing of any changes.

\_\_\_\_\_

Donor or Trustee

\_\_\_\_\_

Date

\_\_\_\_\_

Donor or Trustee

\_\_\_\_\_

Date

**6. Return this completed form and other required documentation by mail or fax to:**

National Philanthropic Trust | 165 Township Line Road, Suite 1200 | Jenkintown, PA 19046 | Fax: (215) 277-3029