



Discretionary Investment Request

Complete this form to recommend a change to the investments and/or holdings for your donor-advised fund. Before recommending an allocation, please review NPT's Investment Policy Guidelines form for approved investment options. Additional forms are available at www.nptrust.org. If you need assistance, call toll-free at (888) 878-7900 or send an email to npt@nptrust.org.

1. Fund Information

Fund Name _____

Primary Advisor _____

Donor Name _____

Primary Telephone # _____

Email _____

2. Investment/Transaction Recommendation

Please detail in the space below your recommendation (attach a separate form if necessary):

Stock Symbol	Quantity	Monthly/Quarterly	Redemption Date

3. Acknowledgement of Terms

I understand that my gifts of property are irrevocable and unconditional contributions when received and accepted by National Philanthropic Trust (NPT), and that NPT retains exclusive legal control over contributed assets. I acknowledge that NPT will take under advisement the investment recommendation, but reserves the right to change the investment allocation under any circumstances. I certify that, to the best of my knowledge, all information in connection with this investment request form is accurate, that it is a recommendation subject to NPT's review and approval, and that all transactions executed by NPT are final. I acknowledge that I have read the NPT Donor Guide and agree to the terms and/or conditions contained therein, and that I will notify NPT in writing of any changes.

Primary Donor Signature/Authorized Representative _____

Date _____

4. 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

Internal Use Only

- NPT Investment Committee
- Staff Review - EH AH DP MB
- Transaction Executed

Date _____
Date _____
Date _____