



Contribution Deadlines

This reference will assist you in making year-end contributions to your donor-advised fund. Following the guidelines below will help to ensure that National Philanthropic Trust (NPT) receives and processes your contributions by the applicable deadline for treatment as a 2018 gift. Contributions must be made to “National Philanthropic Trust.” 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.

Type of Contribution	Action(s) Required	Deadline*
Check	<ul style="list-style-type: none"> Submit a check made payable to “National Philanthropic Trust.” U.S. Mail must be postmarked by December 31. FedEx/Overnight must be received by December 31. Please note the name of the donor-advised fund in the memo section of the check. 	December 31
Money Wire	<ul style="list-style-type: none"> Instruct the financial institution to wire the funds on or before December 31. Suggested: Initiate transfer no later than December 24. 	Initiate Transfer by December 24 Must be received by December 31
Stock	<ul style="list-style-type: none"> Submit a “Letter of Authorization” to the firm holding the stocks. Submit a copy of the “Letter of Authorization” to National Philanthropic Trust. Instruct financial institution to DTC securities. Suggested: Initiate transfer no later than December 24. 	Initiate Transfer by December 24 Must be received by December 31
Stock Certificates	<ul style="list-style-type: none"> U.S. Mail must be postmarked by December 31. FedEx/Overnight must be received by December 31. Send certificates and stock power separately. 	December 31
Bonds	<ul style="list-style-type: none"> Submit a “Letter of Authorization” to the firm holding the bonds. Submit a copy of the “Letter of Authorization” to National Philanthropic Trust. Suggested: Initiate transfer no later than December 24. 	Initiate Transfer by December 24 Must be received by December 31
Mutual Funds	<ul style="list-style-type: none"> Mutual funds must be received in National Philanthropic Trust’s account by December 31. Suggested: Please consult your mutual fund provider; mutual fund transfers may take up to 4–6 weeks, or longer, depending on where they are held. Submit a “Letter of Authorization” to the firm or transfer agent holding the mutual funds. Submit a copy of the “Letter of Authorization” to National Philanthropic Trust. Suggested: Initiate transfer as soon as possible. 	Must be received by December 31
Special Securities, Real Estate and Closely Held Stock	Contact the National Philanthropic Trust toll-free line at (888) 878-7900 and ask to speak to an illiquid asset specialist.	As early as possible

*To receive a 2018 credit for your charitable contributions, NPT must receive your contribution by the last business day of the year, December 31.