



Grant Recommendation

Complete this form to recommend a grant of \$250 or more from your NPT Donor-Advised Fund to support a qualified public charity.

If you need assistance or additional forms, please call (888) 878-7900 or send an email to npt@nptrust.org.

1. Fund Information

Donor-Advised Fund Name

Donor-Advised Fund Account Number

Primary/Joint/Secondary Advisor (First Name, MI, Last Name)

2. Charity

Charity Name

Contact Name

Contact Number

Street Address

City/State

Zip

Tax ID number (if known)

Primary Telephone Number

3. Purpose of Grant (please choose one)

- Unrestricted (default if not checked)
- Alumni fund
- Annual support
- Building fund
- Capital campaign
- General support

- General scholarship support
- Individual or team fundraising
- Missionary support
- Named scholarship support
- Tithe
- Underwrite charity event (no benefits, not paying for attendance, raffle or auction)

Other _____

4. Grant Amount

Indicate the amount of the grant that the organization is to receive.

\$ _____
Amount (\$250 minimum)

5. Grant Frequency

One-time grant

The grant listed will be sent as soon as administratively feasible unless an alternative date is entered below.

Grant date (month/day/year)

Recurring grant (please select recurring timing)

Monthly

Quarterly

Semi-annually

Annually

Required: beginning date (month/day/year)

Required: end date (month/day/year)

6. Grant Recognition

Indicate how the grant should be acknowledged when the check is issued to the recipient organization.

Recognize donor-advised fund name and donor(s)

Anonymous

You may also indicate others to be named with grant, regardless of the recognition choices made above.

In honor of _____

In name of _____

In memory of _____

In gratitude _____

7. Acknowledgement of Terms

If I am the primary or joint advisor, I represent and warrant the following about my grant recommendation; or if I am not the primary or joint advisor, I represent and warrant that I am authorized to make the following representations on behalf of the primary and joint advisor:

- The grant will directly and fully support a charitable program.
- The grant will not pay for attendance at a charitable event (e.g. gala, luncheon, golf outing, auction).
- The grant will not pay for goods/services or any other benefit for myself or any specific individual (e.g. auction item, membership fee, dues, tuition).
- The grant will not be used to support a political campaign or lobbying activity.
- The grant will not support a private non-operating foundation.
- The donor received a charitable deduction upon contributing assets to the donor-advised fund and no one will claim an additional deduction for this grant.

By signing below, I acknowledge my understanding that I am submitting a recommendation and not a direction, and that my recommendation is not legally binding on National Philanthropic Trust (NPT). I acknowledge that NPT retains exclusive legal control over contributed assets. I further 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 recommendation is accurate or I will notify NPT in writing of any changes.

If I am a financial advisor, I further attest that I am submitting this grant recommendation on behalf of my client and with the full authority for my client, and I understand a notice via email will be sent to the Donor Primary Advisor in this account.

Primary/Joint/Secondary/Financial Advisor Signature

Date

8. Return this completed form and other required documentation by mail, fax or email to:

National Philanthropic Trust | 165 Township Line Road, Suite 1200 | Jenkintown, PA 19046

Fax: (215) 277-3029 | npt@nptrust.org