



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 2019 gift. Contributions must be made to “National Philanthropic Trust.” Additional forms are available on DonorView or can be requested by sending an email to npt@nptrust.org or calling (888) 878-7900.

Type of Contribution	Steps Required	Deadline*
Check	<ul style="list-style-type: none"> Submit a check made payable to “National Philanthropic Trust.” Include name of donor-advised fund in memo section of check. U.S. Mail must be postmarked by December 31. FedEx/UPS/other carriers (non-USPS) must be received by December 31. 	December 31
Credit Card	<ul style="list-style-type: none"> Existing donors may contribute to their donor-advised fund via credit card. Once processed, all credit card donations are irrevocable and cannot be reversed. Suggested: Submit donation online via DonorView by noon on December 31. 	December 31
Money Wire	<ul style="list-style-type: none"> Instruct the financial institution to wire the funds on or before December 31. Refer to specific wire instructions on Contribution Agreement. Submit a Contribution Agreement to National Philanthropic Trust. Suggested: Initiate transfer no later than December 26. 	Initiate transfer by December 26 Must be received by December 31
Stock	<ul style="list-style-type: none"> Submit a Letter of Authorization to the firm holding the shares, as needed. Instruct financial institution to DTC securities. Submit a Contribution Agreement to National Philanthropic Trust. Suggested: Initiate transfer no later than December 23. 	Initiate transfer by December 23 Must be received by December 31
Stock Certificates	<ul style="list-style-type: none"> Mail Physical Certificate and Irrevocable Stock/Bond Power with medallion guarantee (mail each under separate cover) to National Philanthropic Trust. Submit a Contribution Agreement to National Philanthropic Trust. U.S. Mail must be postmarked by December 31. FedEx/UPS/other carrier (non-USPS) must be received by December 31. 	December 31
Bonds	<ul style="list-style-type: none"> Submit a Letter of Authorization to the firm holding the bonds, as needed. Submit a Contribution Agreement to National Philanthropic Trust. Suggested: Initiate transfer no later than December 23. 	Initiate transfer by December 23 Must be received by December 31
Mutual Funds	<ul style="list-style-type: none"> Submit a Letter of Authorization to the firm or transfer agent holding the mutual funds, as needed. Submit a Contribution Agreement to National Philanthropic Trust. Please consult your mutual fund provider; mutual fund transfers may take up to 4–6 weeks, or longer, depending on where they are held. Suggested: Initiate transfer no later than November 29. 	Initiate transfer by November 29 Must be received by December 31
Special Securities, Real Estate and Closely Held Stock	For assistance with contributions of special securities, real estate and closely held securities, please 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 2019 credit for your charitable contributions, NPT must receive your contribution by the last business day of the year, December 31.