



National  
Philanthropic  
Trust

*Your partner in giving*

# Contribution Agreement

Complete this form to make an initial contribution of \$25,000 or more, or an additional contribution of \$5,000 or more, to your donor-advised fund.

**National Philanthropic Trust reserves the right to request a new donor-executed contribution agreement if the contribution is not received within 120 days of submission of the original form.**

**If you need assistance, call (888) 878-7900 or send an email to [npt@npitrust.org](mailto:npt@npitrust.org).**

## 1. Donor-Advised Fund Information

Donor-Advised Fund Name

Donor-Advised Fund Account Number

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

## 2. Donor Information

Identify all registered owners of the assets being donated. Note: NPT's gift receipt, which is provided for federal tax reporting purposes, will be sent to the person(s) or trust listed below.

**Primary Donor**    Mr.    Mrs.    Ms.    Dr.

First Name, MI, Last Name

Year of Birth

Street Address

City/State

Zip

Email

Primary Telephone #

**Joint Donor**    Mr.    Mrs.    Ms.    Dr.

First Name, MI, Last Name

Year of Birth

Street Address

City/State

Zip

Email

Primary Telephone #

### Trust

NPT requires either a copy of the trust certificate OR a copy of the relevant pages of the trust agreement that substantiate who the trustee(s) is/are and that the named trustee(s) has the authority to make contributions on behalf of the trust. The relevant sections of the trust requested to meet NPT's requirements include the first page of the trust, the signature page and the pages or sections of the trust which detail the dispositive provision pursuant to which the distribution to NPT will be made.

Name of Trust Agreement

Year of Trust

Trustee (First Name, MI, Last Name)

Primary Telephone #

## 2. Donor Information (continued)

### Private Foundation or Company Information

Company/Organization Name	Employer ID # (if available)	Year of Organization
Street Address	City/State	Zip
Email	Primary Telephone #	

**Authorized Officer**    Mr.    Mrs.    Ms.    Dr.

First Name, MI, Last Name	Title	
Street Address	City/State	Zip
Email	Primary Telephone #	

## 3. Contribution Asset Information

### Assets

For assistance with making a contribution to your donor-advised fund, please or call **(888) 878-7900**.

#### Cash

\_\_\_\_\_

\$ Dollar Amount

\_\_\_\_\_

Transferring Institution

\_\_\_\_\_

Account number at Transferring Institution

#### Check

**Make payable to:**  
National Philanthropic Trust

**Mail check with Contribution Agreement form to:**  
National Philanthropic Trust  
165 Township Line Road  
Suite 1200  
Jenkintown, PA 19046

**Tax ID#:** 23-7825575

#### Cash Wire

(Please note that all information listed below must be included in wire instructions.)

**Bank:** UBS AG  
**ABA #:** 026007993  
**A/C Title:** UBS Financial Services  
**A/C Number:** 101-WA-258641-000  
**F/C A/C Title:** National Philanthropic Trust  
**F/C A/C Number:** UT51093

\_\_\_\_\_

Transferring Institution

\_\_\_\_\_

Account number at Transferring Institution

### Grant or Transfer from Private Foundation or Donor-Advised Fund

\$ \_\_\_\_\_                      By Check                      By Wire

Estimated Dollar Amount

\_\_\_\_\_

Transferring Organization

### 3. Contribution Asset Information (continued)

#### Stocks/Bonds/Mutual Funds

If gifting securities, bonds or mutual funds, please complete the section below as well as **Letter(s) of Instruction** from your external custodian or request a **Letter of Authorization** via email at [npt@nptrust.org](mailto:npt@nptrust.org). If any assets are held in physical form, an Irrevocable Stock/Bond Power is also required for each asset. Originals should be presented to the firm holding the asset(s) and a copy sent to [npt@nptrust.org](mailto:npt@nptrust.org).

If there are more than five instruments being contributed, please list them on an additional sheet.

**Please note that securities held for less than one year cannot be deducted at full market value.**

Name of Stocks/ Bonds/Mutual Funds	Ticker/ CUSIP	# of Shares	Account # and Name of Transferring Institution	Acquisition Date	Estimated Value

**All Depository Trust Company — eligible & free transactions should be directed to:**

**Brokerage Firm:** UBS Financial Services  
**For Benefit of:** National Philanthropic Trust  
**DTC Number:** 0221  
**A/C Title:** National Philanthropic Trust  
**A/C Number:** UT51093

#### Physical Certificates

Mail Physical Certificate and Irrevocable Stock or Bond Power with medallion guarantee under separate cover to National Philanthropic Trust.

#### Restricted Stock, Privately Held Stock and Real Estate

For assistance, please call National Philanthropic Trust at (888) 878-7900.

### 4. 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 3 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 Guide to Your Donor-Advised Fund** 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/Trustee/Authorized Officer

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Donor/Trustee/Authorized Officer

\_\_\_\_\_  
 Date

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

National Philanthropic Trust | 165 Township Line Road, Suite 1200 | Jenkintown, PA 19046  
 Fax: (215) 277-3029 | [npt@nptrust.org](mailto:npt@nptrust.org)