National Philanthropic Trust

Your partner in giving

Bequest Instructions

Bequests can be made from a will, living trust or retirement account to your donor-advised fund at National Philanthropic Trust (NPT). If you do not have an existing donor-advised fund account, please complete a donor application and select the ***Bequest account*** option. Prior to submitting, discuss with your attorney or financial advisor any contribution that will impact your estate plan.

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

1. For bequests made from a will or living trust

A. Timing

Bequests from your will to your donor-advised fund at National Philanthropic Trust can be made either at the time the will is drafted, or by adding a codicil to a will you have already signed. Similarly, you may make a bequest from your living trust either at the time the trust is drafted, or by adding an amendment to the trust you have already signed.

B. Amount

Bequests can be a specific amount of money, a specific asset – such as securities, real estate or other property – or the residue of the estate or balance of the trust. The residue or balance is what is left after making gifts of specific assets to individuals and payment of debts, taxes, and expenses of the estate.

C. Contingencies

Bequests can be made either outright or contingent upon the occurrence of a particular event.

D. Sample Language

Specific Sum, Outright

I give the sum of [INSERT DOLLAR AMOUNT] to National Philanthropic Trust, Jenkintown, Pennsylvania, to be used for my donor-advised fund, [INSERT NAME OF DONOR-ADVISED FUND], or for other purposes in furtherance of National Philanthropic Trust's charitable mission as determined by the Board of Trustees of National Philanthropic Trust.

Specific Asset, Outright

I give my [DESCRIPTION OF PROPERTY] to National Philanthropic Trust, Jenkintown, Pennsylvania, to be used for my donor-advised fund, [INSERT NAME OF DONOR-ADVISED FUND], or for other purposes in furtherance of National Philanthropic Trust's charitable mission as determined by the Board of Trustees of National Philanthropic Trust.

Residuary, Outright

I give the balance of my estate [or a percentage of the balance] to National Philanthropic Trust, Jenkintown, Pennsylvania, to be used for my donor-advised fund, [INSERT NAME OF DONOR-ADVISED FUND], or for other purposes in furtherance of National Philanthropic Trust's charitable mission as determined by the Board of Trustees of National Philanthropic Trust.

Contingent

If [INSERT NAME OF PERSON] predeceases me or disclaims any interest in [INSERT DESCRIPTION OF PROPERTY], then I give such property to National Philanthropic Trust, Jenkintown, Pennsylvania, to be used for my donor-advised fund, [INSERT NAME OF DONOR-ADVISED FUND], or for other purposes in furtherance of National Philanthropic Trust's charitable mission as determined by the Board of Trustees of National Philanthropic Trust.

NPT FOR BR 0702

2. For Bequests made from a retirement account

A. Steps

1. Contact the administrator of your retirement plan.
2. Request a change of beneficiary designation form.
3. Indicate on the form that National Philanthropic Trust is:

-the beneficiary of the balance of the assets remaining in your account after your death.
-the beneficiary of a percentage of the assets remaining in your account after your death.
-the contingent beneficiary of the assets remaining in your account after your death.

B. Sample Language

[INSERT PERCENTAGE] to National Philanthropic Trust, Jenkintown, Pennsylvania, to be used for my donor-advised fund, [INSERT NAME OF DONOR-ADVISED FUND], or for other purposes in furtherance of National Philanthropic Trust's charitable mission as determined by the Board of Trustees of National Philanthropic Trust.