



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 2020 gift. Most assets require the submission of a Contribution Agreement. You may complete this process online via the donor portal at nptdaf.org.

Type of Contribution	Steps Required	Deadline*
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 11:59 ET on December 31. 	December 31
Check	<ul style="list-style-type: none"> Submit a check made payable to National Philanthropic Trust. Include donor-advised fund name and account number in memo 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
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 28. 	Initiate transfer by December 28 Must be received by December 31
Stocks, Bonds and ETFs**	<ul style="list-style-type: none"> 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
Mutual Funds**	<ul style="list-style-type: none"> Instruct mutual fund provider to initiate transfer. 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 30. 	Initiate transfer by November 30 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 National Philanthropic Trust at (888) 878-7900 and ask to speak to an illiquid asset specialist.	As early as possible
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

* To receive a 2020 credit for your charitable contributions, NPT must receive your contribution by the last business day of the year, December 31.

** For gifts of stock, bonds, ETFs or mutual funds, please note that the external custodian currently holding the assets may require that you submit a Letter of Instruction to initiate the transfer of the assets; if so, please present originals of the completed Letter of Instruction to the external custodian and not to NPT.