



How to Make a Contribution

Outlined below are the steps for making a new or additional contribution to your National Philanthropic Trust (NPT) donor-advised fund. This document summarizes all relevant processes and transfer instructions for contributions of various asset types.

For most assets, the first step is to submit a Contribution Agreement. You may complete this process online via the donor portal at nptdaf.org.

Credit Card	Online: You can make a contribution with a credit card through the donor portal.
Cash by Check	<p>Make payable to: National Philanthropic Trust Include on check memo: Donor-advised fund name and account number Mail to: National Philanthropic Trust 165 Township Line Road, Suite 1200, Jenkintown, PA 19046 Tax ID#: 23-7825575</p>
Cash by Wire	<p>Wire to Bank: UBS AG ABA Number: 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 To be completed: Contribution Agreement</p>
Stock, Bonds, Mutual Funds and ETFs*	<p>Transfer 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 To be completed: Contribution Agreement Please note: gifts of mutual funds can take 4–6 weeks to complete.</p>
Restricted Stock	Please contact NPT at (888) 878-7900 for assistance. Processing this type of asset can take 4–6 weeks to complete.
Stock Certificates	<p>Mail Physical Certificate and Irrevocable Stock or Bond Power with medallion guarantee under separate cover to: National Philanthropic Trust 165 Township Line Road, Suite 1200, Jenkintown, PA 19046 To be completed: Contribution Agreement</p>

* If gifting stocks, bonds, mutual funds or ETFs, 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.