



Contribution Agreement

Please provide a contribution agreement each time you contribute to your donor-advised fund (DAF) account. You may complete the agreement either by using this form or by logging in to your DAF account at nptdaf.org and selecting *Contribute to Account*. If you are making an initial contribution to establish your DAF, the minimum is \$10,000.

National Philanthropic Trust (NPT) 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 email npt@nptrust.org.

1. Donor-Advised Fund Information

Donor-Advised Fund Name

DAF Account Number

Primary Advisor

Prefix First Name MI Last Name Suffix

2. Select a Donor

Identify all registered owner(s) of the assets being donated. NPT will provide a contribution receipt for federal tax reporting purposes to the person(s) identified. Contribution receipts will be made available on the donor portal. **If the contribution is being made by a Private Foundation or Company, skip below sections and complete information on the next page.**

Primary Donor

Prefix First Name MI Last Name Suffix Year of Birth

Street Address City State ZIP

Email Phone

Does the Primary Donor hold a U.S. passport? Yes No

Joint Donor

Prefix First Name MI Last Name Suffix Year of Birth

Street Address City State ZIP

Email Phone

Does the Joint Donor hold a U.S. passport? Yes No

2. Select a Donor (continued)

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 dispository provision pursuant to which the distribution to NPT will be made.

Name of Trust Agreement	Tax ID number/EIN	Year of Trust	
Name of Trustee			
Street Address	City	State	ZIP
Email	Phone		

Private Foundation or Company Information

Complete below and attach NPT's **Corporate/Organization Resolution and Indemnification** form.

Company/Organization Name	Tax ID number/EIN	Year of Organization	
Street Address	City	State	ZIP
Email	Phone		

Authorized Officer

Prefix	First Name	MI	Last Name	Suffix	Title
Street Address			City	State	ZIP
Email	Phone				

3. Contribution Asset Information

Cash (Wire)

Dollar Amount \$	Wire ID (if known)
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Transferring Institution

Account # at Transferring Institution

Send Wire to:

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

Will any portion of your gift originate from a bank account outside of the U.S? Yes No

3. Contribution Asset Information (continued)

Check

Check Amount \$

Make payable to: National Philanthropic Trust
Note: On your check memo line, please include your DAF name and account number.

Check Number

Mail check with Contribution Agreement form to:
 National Philanthropic Trust
 165 Township Line Road, Suite 1200
 Jenkintown, PA 19046
Tax ID#: 23-7825575

Grant or Transfer from Private Foundation or Donor-Advised Fund

Estimated Dollar Amount \$

Transferring Institution

By Check
 By Wire

Stocks/Bonds/Mutual Funds/ETFs

If contributing securities, bonds, or mutual funds, please complete the section below. 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.

Are you a corporate officer, director or other executive of the stock issuer, or a member of the controlling group otherwise an affiliate of the stock issuer for any of the securities below? Yes No

Are any securities that you are contributing pursuant to this agreement restricted or control securities and subject to: Rule 144, 144A, 145, 701 or Regulation S of the U.S. Securities Act of 1933, as amended, an effective registration statement, and/or any contractual limitations. Yes No

- If you answered “Yes” to the either of the above two questions, please check “Yes” in the table below relative to the specific securities. A member of our Donor Relations Team will forward to you a **Restricted Stock Questionnaire** that must be completed prior to NPT accepting your contribution.*

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

Name of Stocks/ Bonds/ Mutual Funds/ETFs	Ticker/ CUSIP	# of Shares	Restricted/ Control*	Account # and Name of Transferring Institution	Acquisition Date	Estimated Value
			Yes No			
			Yes No			
			Yes No			
			Yes No			
			Yes No			
			Yes No			
			Yes No			
			Yes No			
			Yes No			
			Yes No			

Please make copies of this page if there are more than 10 instruments being contributed.

Will any portion of your gift originate from a bank account outside of the U.S? Yes No

3. Contribution Asset Information (continued)

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 and Other Non-Cash Asset Types

Further documentation will be required. 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 NPT, and that NPT retains exclusive legal control over contributed assets.

By signing below I represent that I will, and undertake to, comply with and fulfill all of my obligations under applicable laws, regulations and any corporate insider trading policies or procedures to which I may be subject, and will not breach such applicable laws, regulations or policies and procedures with respect to any contribution to a donor-advised fund (DAF). I represent that as of the date of this agreement I am not in possession of any material non-public information with respect to any such contributed securities. Further, I represent that I will not transfer or direct a transfer of securities to National Philanthropic Trust (NPT), nor will I make any investment recommendation, at a time when I am in possession of any material non-public information with respect to such securities or recommendation. I also agree to provide NPT promptly with all information necessary for NPT to perform its obligations under applicable laws and regulations.

By signing below, I understand and agree that NPT, in its sole discretion, may decline to accept certain restricted or control securities and/or may decline to accept a contribution until NPT has conducted due diligence on the contribution transaction. I further agree to provide, without cost to NPT, all documentation required by NPT to complete due diligence on my contribution. Furthermore, I acknowledge and agree that there may be a time delay in NPT's processing and acceptance of my contribution as a result of the due diligence process.

I acknowledge that I have read the NPT's **A 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. Additionally, I understand, in accordance with NPT's Know Your Client/Anti-Money Laundering Procedures, that NPT may obtain, record and verify information that identifies each person who makes a contribution to a donor-advised fund at NPT.

Donor/Trustee/Authorized Officer Signature

Print name

Date (DD/MM/YYYY)

Joint Donor/Trustee/Authorized Officer Signature

Print name

Date (DD/MM/YYYY)

RETURN THIS COMPLETED FORM BY MAIL, FAX OR EMAIL TO: National Philanthropic Trust

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