



Donor-Advised Fund Update

For Private Foundations and Companies

Complete this form to update your donor-advised fund information. You can change the fund name, contact information, or advisors for an existing donor-advised fund. It is not necessary to enter information that has not changed. Additional forms are available at www.nptrust.org. If you need assistance, call toll-free at (888) 878-7900 or send an email to npt@nptrust.org.

1. Current Donor-Advised Fund Information

Donor-Advised Fund Name

Authorized Officer

2. Donor-Advised Fund Name Update

New Donor-Advised Fund Name

3. Primary Advisor Update

Any changes to the Primary Advisor's address will become your account's primary address for all correspondence unless otherwise noted.

Mr. Mrs. Ms. Dr.

First Name, MI, Last Name

Title

Company/Organization

Street Address

City/State

Zip

Email

Primary Telephone #

4. Certifying Officer

As the Authorized Officer of the organization listed in Section 1, I certify that each of the changes listed in Sections 2 and 3 are duly authorized. I am authorized and directed to certify the above and that these provisions conform to the charter of my organization.

Mr. Mrs. Ms. Dr.

First Name, MI, Last Name

Title

Signature

Date (month, day, year)

5. Return this completed form and other required documentation by mail or fax to:

National Philanthropic Trust | 165 Township Line Road, Suite 1200 | Jenkintown, PA 19046 | Fax: (215) 277-3029