



## 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 2021 gift. Most assets require the submission of a Contribution Agreement. You may complete this process online at [nptgivingpoint.org](https://nptgivingpoint.org).

Type of Contribution	Steps Required	Deadline*
<b>Credit Card</b>	<ul style="list-style-type: none"> <li>Existing donors may contribute to their donor-advised fund via credit card.</li> <li>Once processed, all credit card donations are irrevocable and cannot be reversed.</li> <li><b>Suggested:</b> Submit donation online via NPT GivingPoint by 11:59pm ET on December 31.</li> </ul>	<b>December 31</b>
<b>Check</b>	<ul style="list-style-type: none"> <li>Submit a check made payable to <b>National Philanthropic Trust</b>.</li> <li>Include donor-advised fund name and account number in memo of check.</li> <li>U.S. Mail must be <b>postmarked</b> by December 31.</li> <li>FedEx/UPS/other carriers (non-USPS) must be received by NPT by 3 p.m. ET on <b>December 31</b>.</li> </ul>	<b>December 31</b>
<b>Money Wire</b>	<ul style="list-style-type: none"> <li>Instruct the financial institution to wire the funds on or before <b>December 31</b>.</li> <li>Refer to specific wire instructions on Contribution Agreement.</li> <li>Submit a Contribution Agreement to National Philanthropic Trust.</li> <li><b>Suggested:</b> Initiate transfer no later than <b>December 27</b>.</li> </ul>	Initiate transfer by <b>December 27</b> Must be received by <b>December 31</b>
<b>Stocks, Bonds and ETFs**</b>	<ul style="list-style-type: none"> <li>Instruct financial institution to DTC securities.</li> <li>Submit a Contribution Agreement to National Philanthropic Trust.</li> <li><b>Suggested:</b> Initiate transfer no later than <b>December 23</b>.</li> </ul>	Initiate transfer by <b>December 23</b> Must be received by <b>December 31</b>
<b>Mutual Funds**</b>	<ul style="list-style-type: none"> <li>Instruct mutual fund provider to initiate transfer.</li> <li>Submit a Contribution Agreement to National Philanthropic Trust.</li> <li>Please consult your mutual fund provider; mutual fund transfers may take up to 4–6 weeks, or longer, depending on where they are held.</li> <li><b>Suggested:</b> Initiate transfer no later than <b>November 30</b>.</li> </ul>	Initiate transfer by <b>November 30</b> Must be received by <b>December 31</b>
<b>Cryptocurrency</b>	<ul style="list-style-type: none"> <li>Please contact National Philanthropic Trust at (888) 878-7900 and ask to speak to a cryptocurrency specialist.</li> <li><b>NOTE:</b> After due diligence, assets must be successfully cleared through the blockchain by 11:59pm ET on December 31 to count as a 2021 contribution.</li> </ul>	All documentation must be received by <b>December 22</b> Assets must be received by <b>December 31</b>



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<p><b>Special Securities, Real Estate and Closely Held Stock</b></p>	<p>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.</p>	<p><b>As early as possible</b></p>
<p><b>Stock Certificates***</b></p>	<ul style="list-style-type: none"> <li>• Work with the issuer’s transfer agent to determine what documentation is required to transfer the certificates to National Philanthropic Trust. Obtain and fully complete all required forms, including medallion guarantee.</li> <li>• Mail (i) physical certificate and (ii) all of the completed forms required by the transfer agent, including an irrevocable stock/bond power properly endorsed with medallion guarantee to National Philanthropic Trust. We recommend mailing each of (i) and (ii) under separate cover, and obtaining insurance on the package containing the physical certificates.</li> <li>• Submit a Contribution Agreement to National Philanthropic Trust.</li> </ul>	<p>Initiate process <b>As early as possible</b></p> <p>Must be received (or postmarked, if shipping via USPS) by <b>December 31</b></p>

\* To receive a 2021 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.

\*\*\* Transferee must be listed as "National Philanthropic Trust." Do not include the name of your donor-advised fund in the transferee name. Failure to provide all required forms, failure to complete the forms properly and/or sending the documentation to any recipient other than National Philanthropic Trust (including directly to the transfer agent or to your financial advisor) could delay the gift date.