



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. Please note that we cannot accept contributions in the form of ACH transfers.

For most assets, the first step is to submit a Contribution Agreement. You may complete this process online via NPT GivingPoint at nptgivingpoint.org.

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| Credit Card | Online: You can make a contribution with a credit card through NPT GivingPoint. |
| Cash by Check | 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 |
| Cash by Wire | 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 |
| Stock, Bonds, Mutual Funds and ETFs* | 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. |
| Restricted Stock | Please contact NPT at (888) 878-7900 for assistance. Processing this type of asset can take 4–6 weeks to complete. |
| Cryptocurrency | Please contact NPT at (888) 878-7900 and ask to speak to a cryptocurrency specialist. |
| Alternative Investments (e.g. hedge fund and private equity) | Please contact NPT at (888) 878-7900 for assistance. Please note, minimums apply; please see NPT's Illiquid Asset Contribution Guidelines for details. |
| Stock Certificates | 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 |

* 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.