



# Donor-Advised Fund Update

Update your donor-advised fund information either by using this form, or by logging on to the donor portal at [nptgivingpoint.org](http://nptgivingpoint.org) and selecting *Update Account* from the *Manage Account* menu. You can change the donor-advised fund (DAF) name, contact information, advisors or recommend a new or updated Legacy Plan for an existing donor-advised fund. It is not necessary to enter information that has not changed.

If you need assistance, call (888) 878-7900 or send an email to [npt@nptrust.org](mailto:npt@nptrust.org).

## 1. Current Donor-Advised Fund Name

Current Donor-Advised Fund Name (required)

Donor-Advised Fund Account Number (if known)

### Primary Advisor

Prefix First Name MI Last Name Suffix

## 2. Donor-Advised Fund Name Update

## 3. Primary Advisor Contact Information Update

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

Prefix First Name MI Last Name Suffix Year of Birth

Street Address City State ZIP

Email Phone (Required for online access)

## 4. Trust Address Update

This section may be used for updating the address of a trust. If you are updating more than one trust, please make additional copies of this page as needed. To add a new trustee, please submit a separate **Trust Certification form**.

Trust Name

Street Address City State ZIP

## 5. Joint Advisor or Secondary Advisor Updates (Individual Accounts Only)

Update, delete or add advisor contact information below. A Joint Advisor must consent to their removal by signing where indicated. Secondary Advisors will not succeed the Primary nor Joint Advisors unless specifically named as successors. To indicate additional advisor updates, attach a separate sheet.

Please note that this section may only be used for Joint or Secondary Advisor updates for a DAF account where an individual serves as the Primary Advisor and should not be used for legal entity accounts. If you need to update the authorized individuals for a legal entity, please submit a **Corporate/Entity Resolution form**.

**Note:** Only one Joint Advisor is permitted per account.

Update	Delete	Add	As a:	Joint Advisor	Secondary Advisor		
Prefix	First Name		MI	Last Name		Suffix	Year of Birth
Street Address				City		State	ZIP
Email				Phone			

### Secondary Advisor is authorized to:

Read-only Access: Permits the authorized party to view donor-advised fund information online **OR**

Full Access: Permits the authorized party to view donor-advised fund information online **AND** to recommend investments and grants.

### If removing a Joint Advisor:

I consent to my removal as a Joint Advisor

\_\_\_\_\_   
 Joint Advisor Signature

## 6. Legacy Plan Updates (Individual Accounts Only)

The Primary and/or Joint Advisor may select any combination of three Legacy Plan options (subject to the qualifications noted below). Please designate the respective percentages of remaining DAF account assets that you would like distributed according to the three options upon the notification of the death of the last Primary or Joint Advisor. The total percentage of DAF assets allocated to selected Legacy Plan options must equal 100%.

OPTION 1: SUCCESSOR ADVISORS	OPTION 2: CHARITABLE BENEFICIARIES	OPTION 3: ENDOWMENT PROGRAM (\$100,000 minimum required)*
Name individual successor advisors to your DAF. Each will be designated as a Primary Advisor on a new DAF account at the time of Legacy Plan activation (e.g., receipt of death certificate).	Designate one or more charities to receive a lump-sum grant at the time of Legacy Plan activation (e.g., receipt of death certificate). Minimum grant amount is \$250/per charity.	Select total percentage of DAF assets designated to Option 3 – Endowment Program.
Select percentage of DAF assets designated to each named successor advisor.	Select percentage of DAF assets designated to each named Charitable Beneficiary.	Select the total percentage of Endowment Account assets to be allocated annually among all named beneficiaries.
If division of assets for Option 1 creates DAF account(s) with balance(s) below \$10,000, successor(s) will have 90 days to bring balance up to the \$10,000 DAF minimum or recommend grants to qualified charities.	If a designated charity is not eligible to receive a grant at the time of Legacy Plan activation, designated assets will be reallocated among the remaining charities.**	Designate one or more charities to receive an annual recurring grant and specify the percentage that each charity will receive from the Endowment Account balance. Allocation must equal 100%. Minimum grant amount is \$250/per charity. <b>Example: Charity #1 (40%), Charity #2 (60%).</b>
<p>* \$100,000 minimum required at the time of Legacy Plan activation for Endowment Program eligibility. If available DAF assets are less than \$100,000, this Legacy Plan selection will revert to Option 2.</p> <p>** If no designated charity is eligible to receive grants at the time of Legacy Plan activation, NPT will make a grant to qualified charitable organization(s) as similar as possible in mission and scope (as determined by NPT in its sole discretion) or will reserve the right to transfer the balance of the account to the NPT Giving Fund.</p>		<p>Assets allocated to the Endowment Account will be invested in the Conservative investment pool option available at the time of activation; trading will occur within 90 days of the receipt of written notice of the Legacy Plan activation (e.g., receipt of death certificate).</p> <p>When an Endowment Account balance reaches \$25,000, final lump-sum grant(s) will be made to designated charities.**</p>

## 6. Legacy Plan Update (continued)

### Option 1: Successor Advisor

<b>Option 1 – Allocation Subtotal:</b>	<b>%</b>
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You may designate individual successors to your DAF. Please make copies of this page if you wish to designate more than two successors.

#### Successor 1

Prefix	First Name	MI	Last Name	Suffix	<b>Allocation %</b>
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Street Address	City	State	ZIP
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Email	Phone
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#### Successor 2

Prefix	First Name	MI	Last Name	Suffix	<b>Allocation %</b>
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Street Address	City	State	ZIP
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Email	Phone
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### Option 2: Charitable Beneficiaries

<b>Option 2 – Allocation Subtotal:</b>	<b>%</b>
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You may designate one or more charities. Please make copies of this page if you wish to designate more than two charitable beneficiaries.

#### Charitable Beneficiary 1

Charity Name	Tax ID number (if known)	<b>Allocation %</b>
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Street Address	City	State	ZIP
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Email	Phone
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#### Charitable Beneficiary 2

Charity Name	Tax ID number (if known)	<b>Allocation %</b>
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Street Address	City	State	ZIP
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Email	Phone
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6. Legacy Plan Update (continued)

**Option 3: Endowment Program (\$100,000 minimum required)**

<b>Option 3 – Allocation Subtotal for Endowment Program:</b>	<b>%</b>
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<b>% of assets to be allocated annually to charities listed below:</b>	<b>%</b>
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You may designate one or more qualified charitable organizations. Please make copies of this page if you wish to designate more than two charitable organizations.

**Endowment Charitable Organization 1**

Organization Name	<b>Endowment Allocation %</b>		
Street Address	City	State	ZIP
Email	Employer ID # (if known)	Phone	

**Endowment Charitable Organization 2**

Organization Name	<b>Endowment Allocation %</b>		
Street Address	City	State	ZIP
Email	Employer ID # (if known)	Phone	

**% OPTION 1 – ALLOCATION SUBTOTAL**

**% OPTION 2 – ALLOCATION SUBTOTAL**

**% OPTION 3 – ALLOCATION SUBTOTAL**

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**TOTAL: 100%**



## 9. Acknowledgement of Terms

I understand that these changes will be subject to all terms that apply to the donor-advised fund. I certify that, to the best of my knowledge, all information in connection with this form is accurate and I will notify National Philanthropic Trust in writing of any changes.

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Primary or Joint Advisor Signature

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Print Name

Date (MM/DD/YYYY)

**RETURN THIS COMPLETED FORM BY EMAIL OR MAIL TO: National Philanthropic Trust**  
165 Township Line Road, Suite 1200, Jenkintown, PA 19046 | [npt@nptrust.org](mailto:npt@nptrust.org)