National Philanthropic Trust

Your partner in giving

Guidance for Planned Giving

Donors may designate their donor-advised fund at National Philanthropic Trust (NPT) to receive a planned gift at death through their will, trust, or beneficiary designations. If you do not have an existing donor-advised fund account, please reach out to NPT at (888) 878-7900 or npt@nptrust.org to begin the process of establishing an account before naming NPT as a beneficiary.

1. Planned gifts through a will or trust

If you would like to include a gift to your donor-advised fund at NPT in your will or trust, please reach out to your estate planning attorney for assistance and provide them with the below sample language. It is important to name "National Philanthropic Trust," the public charity that sponsors and administers the donor-advised fund, as the beneficiary to ensure proper treatment. Please reach out to NPT prior to including any additional restrictions on a planned gift other than allocation to your donor-advised fund.

Sample Language

Specific Sum
I give the sum of [INSERT DOLLAR AMOUNT] to National Philanthropic Trust (EIN 23-7825575), for allocation to [INSERT NAME OF DONOR-ADVISED FUND], in furtherance of National Philanthropic Trust's charitable mission.

Residuary Estate
I give [INSERT PERCENTAGE] of the balance of my estate to National Philanthropic Trust (EIN 23-7825575), for allocation to [INSERT NAME OF DONOR-ADVISED FUND], in furtherance of National Philanthropic Trust's charitable mission.

Contingent Gift
If [INSERT NAME OF PERSON] does not survive me, I give the interest designated for such person to National Philanthropic Trust (EIN 23-7825575), for allocation to [INSERT NAME OF DONOR-ADVISED FUND], in furtherance of National Philanthropic Trust's charitable mission.

2. Planned gifts of beneficiary designated assets (retirement account, life insurance, etc.)

Certain assets, such as retirement accounts and life insurance policies, are not controlled by your will or trust, but will pass in accordance with the beneficiary designation you have on file with the administrator of the plan or policy. If you would like all or a portion of any such asset to pass to your donor-advised fund at your death, you must update your beneficiary designations for that asset. We encourage you to consult with your estate planning attorney regarding any impact this will have on your overall estate plan.

Steps to Updating Beneficiary Designations

- Contact the administrator of the plan or policy and request information on how to update your beneficiary designations.

- Utilize the form or online portal as directed by the administrator to update your beneficiaries. Designate "National Philanthropic Trust" (EIN 23-7825575) as a beneficiary of all or a portion of the asset in accordance with your wishes. If the administrator's form permits, please include a reference to the name of your donor-advised fund, such as "for allocation to [INSERT NAME OF DONOR-ADVISED FUND]."