



# Contribution Agreement

Please provide a contribution agreement each time you contribute to your donor-advised fund (DAF) account. You may complete the agreement either by using this form or by logging in to your DAF account at [nptgivingpoint.org](http://nptgivingpoint.org) and selecting *Contribute to Account*. If you are making an initial contribution to establish your DAF, the minimum is \$10,000. National Philanthropic Trust recommends completing this contribution agreement in advance of submitting assets.

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

## 1. Donor-Advised Fund Information

Donor-Advised Fund Name DAF Account Number

### Primary Advisor

Prefix First Name MI Last Name Suffix

## 2. Asset Ownership Information

Identify all registered owner(s) of the assets being donated. NPT will provide a contribution receipt for federal tax reporting purposes to the person(s) identified. Contribution receipts will be made available on the donor portal. **If the contribution is being made by a Private Foundation or Company, skip below sections and complete information on the next page.**

### Owner of the Asset

Prefix First Name MI Last Name Suffix Year of Birth

Street Address City State ZIP

Email Phone

Does the Owner of the Asset hold a U.S. passport? Yes No

### Joint Owner of the Asset

Prefix First Name MI Last Name Suffix Year of Birth

Street Address City State ZIP

Email Phone

Does the Joint Owner of the Asset hold a U.S. passport? Yes No

*National Philanthropic Trust (NPT) reserves the right to request a new donor-executed contribution agreement if the contribution is not received within 120 days of submission of the original form.*



## 2. Asset Ownership Information (continued)

### Trust

For contributions from a trust, the trustee(s) must sign this Contribution Agreement and provide either a copy of the trust agreement or a trust certification that identifies all trustees and confirms the authority of the trustee(s) to make distributions from the trust to NPT. NPT's Trust Certification Form may be used for this purpose.

Name of Trust Agreement	Tax ID number/EIN	Year of Trust
-------------------------	-------------------	---------------

Name of Trustee

Street Address	City	State	ZIP
----------------	------	-------	-----

Email	Phone
-------	-------

### Private Foundation or Company Information

Complete below and attach NPT's Corporate/Organization Resolution and Indemnification form. Note: The Resolution Form is required unless the company previously submitted this form or the Donor Application for Legal Entities to NPT.

Company/Organization Name	Tax ID number/EIN	Year of Organization
---------------------------	-------------------	----------------------

Street Address	City	State	ZIP
----------------	------	-------	-----

Email	Phone
-------	-------

### Authorized Advisor

Prefix	First Name	MI	Last Name	Suffix	Title
--------	------------	----	-----------	--------	-------

Street Address	City	State	ZIP
----------------	------	-------	-----

Email	Phone
-------	-------



### 3. Contribution Asset Information

#### Cash (Wire)

Dollar Amount \$

Wire ID (if known)

Transferring Institution

Account # at Transferring Institution

**Send Wire to:**

**Bank:** UBS AG

**ABA #:** 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

**Please Note:**

It is essential to include all details of these wire instructions in order to properly initiate the transfer of asset(s). Omitting details could delay processing.

Will any portion of your gift originate from a bank account outside of the U.S?    Yes    No

#### Check

Check Amount \$

Check Number

**Make payable to:** National Philanthropic Trust

**Note:** On your check memo line, please include your DAF name and account number.

**Mail check with Contribution Agreement form to:**

National Philanthropic Trust

165 Township Line Road, Suite 1200

Jenkintown, PA 19046

**Tax ID#:** 23-7825575

#### Grant or Transfer from a Donor-Advised Fund

Estimated Dollar Amount \$

Transferring Institution

By Check

By Wire

Account # at Transferring Institution

Wire ID (if known)



**Stocks/Bonds/Mutual Funds/ETFs**

If contributing securities, bonds, or mutual funds, please complete the section below. 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.

**1. For any of the securities listed below, are you or have you been in the last 90 days, an officer, director, control person or affiliate, or holder of more than 10% of the outstanding shares of the company?**  
 Yes      No

**2. Are any securities that you are contributing pursuant to this agreement restricted or control securities and subject to: Rule 144, 144A, 145, 701 or Regulation S of the U.S. Securities Act of 1933, as amended, an effective registration statement, and/or any contractual limitations?**  
 Yes      No

• If you answered “Yes” to the either of the above two questions, please check “Yes” in the “Restricted/Control” column in the table below relative to the specific securities, and please contact NPT at (888) 878-7900 or [npt@nptrust.org](mailto:npt@nptrust.org) for further guidance prior to initiating a transfer of the securities. A member of our Donor Relations Team will forward to you a Restricted and Control Stock Questionnaire that must be completed prior to NPT accepting your contribution.\*

**Note: Securities held for less than one year may not be eligible for a fair market value tax deduction.**

If you are contributing more securities than can fit on this page, please attach a spreadsheet itemizing the securities being contributed. For security reasons, please do not forward a copy of the brokerage statements or other information directly from the transferring account.

Name of Stocks/ Bonds/ Mutual Funds/ETFs	Ticker/ CUSIP	# of Shares	Restricted/ Control*	Account # and Name of Transferring Institution	Acquisition Date	Estimated Value
			Yes    No			
			Yes    No			
			Yes    No			
			Yes    No			
			Yes    No			
			Yes    No			
			Yes    No			
			Yes    No			
			Yes    No			

**Will any portion of your gift originate from a bank account outside of the U.S?**      Yes      No

**All Depository Trust Company — eligible & free transactions should be directed 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

**Physical Certificates and Other Non-Cash Asset Types**  
 Further documentation will be required. For assistance, please call National Philanthropic Trust at (888) 878-7900.



#### 4. Acknowledgement of Terms (All donors or trustees named in Section 2 must sign below)

I understand that my gift of the property described in Section 3 is an irrevocable and unconditional contribution when received and accepted by NPT, and that NPT retains exclusive legal control over contributed assets.

By signing below I represent that I will, and undertake to, comply with and fulfill all of my obligations under applicable laws, regulations and any corporate insider trading policies or procedures to which I may be subject, and will not breach such applicable laws, regulations or policies and procedures with respect to any contribution to a DAF. I represent that as of the date of this agreement, unless I have informed NPT in writing, I am not in possession of any material non-public information with respect to any such contributed securities. Further, I represent that (i) I will not make any investment recommendation at a time when I am in possession of any material non-public information with respect to such securities and (ii) I will inform NPT in writing if I am in possession of material non-public information with respect to securities and/or their issuer at the time I transfer or direct a transfer of such securities to NPT. I also agree to provide NPT promptly with all information necessary for NPT to perform its obligations under applicable laws and regulations. I understand that NPT will implement procedures that will limit the sale of contributed securities if I am in possession of material non-public information at the time of transfer.

By signing below, I understand and agree that NPT, in its sole discretion, may decline to accept certain restricted or control securities and/or may decline to accept a contribution until NPT has conducted due diligence on the contribution transaction. I further agree to provide, without cost to NPT, all documentation required by NPT to complete due diligence on my contribution. Furthermore, I acknowledge and agree that there may be a time delay in NPT's processing and acceptance of my contribution as a result of the due diligence process.

I acknowledge that I have read the NPT's A Guide to Your Donor-Advised Fund and agree to the terms and/or conditions contained therein. I certify that, to the best of my knowledge, all information in connection with this contribution agreement is accurate and I will notify NPT in writing of any changes. Additionally, I understand, in accordance with NPT's Know Your Client/Anti-Money Laundering Procedures, that NPT may obtain, record and verify information that identifies each person who makes a contribution to a donor-advised fund at NPT.

---

Owner of the Asset/Trustee/Authorized Advisor Signature

---

Print Name

---

Date (MM/DD/YYYY)

---

Joint Owner of the Asset/Trustee/Authorized Advisor Signature

---

Print Name

---

Date (MM/DD/YYYY)

**RETURN THIS COMPLETED FORM BY MAIL OR EMAIL TO: National Philanthropic Trust**

165 Township Line Road, Suite 1200, Jenkintown, PA 19046 | [npt@nptrust.org](mailto:npt@nptrust.org)

