



## Contribution Deadlines

This reference will assist you in making year-end contributions to your donor-advised fund (DAF). 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 2023 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 DAF 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 GivingPoint by 11:59 p.m. ET on <b>December 31</b>.</li> </ul>	<b>December 31</b>
<b>Check (Sent via USPS)</b>	<ul style="list-style-type: none"> <li>Submit a check made payable to “<b>National Philanthropic Trust.</b>”</li> <li>Include DAF name and account number in memo of check.</li> <li>Mail must be <b>postmarked</b> by <b>December 30</b>.</li> </ul>	<b>December 30</b>
<b>Check (Sent via FedEx, UPS or other non-USPS carrier)</b>	<ul style="list-style-type: none"> <li>Submit a check made payable to “<b>National Philanthropic Trust.</b>”</li> <li>Include DAF name and account number in memo of check.</li> <li>Check must be received by NPT by 3 p.m. ET on <b>December 29</b>.</li> </ul>	<b>December 29</b>
<b>Money Wire</b>	<ul style="list-style-type: none"> <li>Instruct your financial institution to wire the funds.</li> <li>Refer to specific wire instructions on Contribution Agreement.</li> <li>Submit a signed Contribution Agreement to NPT.</li> <li><b>Suggested:</b> Initiate transfer no later than <b>December 22</b>.</li> </ul>	Initiate transfer by <b>December 22</b> Must be received by <b>December 29</b>
<b>Stocks, Bonds and ETFs**</b>	<ul style="list-style-type: none"> <li>Instruct your financial institution to transfer securities to NPT via Depository Trust Company (DTC); NPT cannot initiate transfers on your behalf.</li> <li>Refer to specific DTC instructions on Contribution Agreement.</li> <li>Submit a signed Contribution Agreement to NPT.</li> <li><b>Suggested:</b> Initiate transfer no later than <b>December 21</b>.</li> </ul>	Initiate transfer by <b>December 21</b> Must be received by <b>December 29</b>



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Type of Contribution	Steps Required	Deadline*
<b>Mutual Funds**</b>	<ul style="list-style-type: none"> <li>Instruct mutual fund provider to initiate transfer to NPT; NPT cannot initiate transfers on your behalf.</li> <li>Submit a signed Contribution Agreement to NPT.</li> <li>Please consult with 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 29</b>.</li> </ul>	Initiate transfer by <b>November 29</b>  Must be received by <b>December 29</b>
<b>Cryptocurrency</b>	<ul style="list-style-type: none"> <li>Please contact NPT 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 11:59 p.m. ET on <b>December 31</b> to count as a 2023 contribution.</li> </ul>	All documentation must be received by <b>December 20</b>  Assets must be received by <b>December 31</b>
<b>Special Securities, Real Estate and Closely Held Stock</b>	<p>For assistance with contributions of special securities, real estate and closely held securities, please contact NPT at (888) 878-7900 and ask to speak to an illiquid asset specialist. Due diligence on these assets can sometimes take up to 6–8 weeks or longer.</p>	<b>As early as possible</b>
<b>Stock Certificates***</b>	<p>Where possible, convert stock certificates to electronic shares and transfer via DTC. For assistance, please call (888) 878-7900. If timing does not permit, follow the process outlined below:</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 NPT. 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 “<b>National Philanthropic Trust.</b>” 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 signed Contribution Agreement to NPT.</li> </ul>	Initiate process <b>as early as possible</b>  If shipping via USPS, package must be postmarked by <b>December 30</b>  If shipping via FedEx, UPS or other non-USPS carrier, required documentation must be received by NPT in good order by 3 p.m. ET, <b>December 29</b>

\* To receive a 2023 credit for your charitable contributions, NPT must take possession of your contribution by the last day of the year, December 31. Assets in-transit are not considered received by NPT.

\*\* 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.