



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 2024 gift. Most assets require the submission of a Contribution Agreement. You may complete this process online at nptgivingpoint.org.

Type of Contribution	Steps Required	Deadline*
Credit Card	<ul style="list-style-type: none"> Existing donors may contribute to their DAF via credit card. Once processed, all credit card donations are irrevocable and cannot be reversed. Submit donation online via GivingPoint by 11:59 p.m. ET on December 31. 	December 31
Check (Sent via USPS)	<ul style="list-style-type: none"> Submit a check made payable to “National Philanthropic Trust.” Include DAF name and account number in memo of check. Mail must be postmarked by December 31. 	December 31
Check (Sent via FedEx, UPS or other non-USPS carrier)	<ul style="list-style-type: none"> Submit a check made payable to “National Philanthropic Trust.” Include DAF name and account number in memo of check. Check must be received by NPT by 3 p.m. ET on December 31. 	December 31
Money Wire	<ul style="list-style-type: none"> Instruct your financial institution to wire the funds. Refer to specific wire instructions on Contribution Agreement. Submit a signed Contribution Agreement to NPT. Suggested: Initiate transfer no later than December 24. 	Initiate transfer by December 24 Must be received by December 31
Stocks, Bonds and ETFs**	<ul style="list-style-type: none"> Instruct your financial institution to transfer securities to NPT via Depository Trust Company (DTC); NPT cannot initiate transfers on your behalf. Refer to specific DTC instructions on Contribution Agreement. Submit a signed Contribution Agreement to NPT. Suggested: Initiate transfer no later than December 23. 	Initiate transfer by December 23 Must be received by December 31



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Type of Contribution	Steps Required	Deadline*
Mutual Funds**	<ul style="list-style-type: none"> Instruct mutual fund provider to initiate transfer to NPT; NPT cannot initiate transfers on your behalf. Submit a signed Contribution Agreement to NPT. Please consult with your mutual fund provider; mutual fund transfers may take up to 6 weeks or longer depending on where they are held. Suggested: Initiate transfer no later than November 30. 	<p>Initiate transfer by November 30</p> <p>Must be received by December 31</p>
Cryptocurrency	<ul style="list-style-type: none"> Please contact NPT at (888) 878-7900 and ask to speak to a Regional Director. Due diligence can take several weeks. Crypto assets must be received by NPT by 11:59 p.m. ET on December 31 to count as a 2024 contribution. 	<p>All documentation must be received by December 18</p> <p>Assets must be received by December 31</p>
Special Securities, Real Estate and Closely Held Stock, Private Investment Funds	<ul style="list-style-type: none"> Please contact NPT at (888) 878-7900 and ask to speak to a Regional Director. Due diligence on these assets can take up to 8 weeks or longer. 	<p>Initiate process as early as possible</p>
Stock Certificates***	<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"> 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. 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 "National Philanthropic Trust." We recommend mailing each of (i) and (ii) under separate cover and obtaining insurance on the package containing the physical certificates. Submit a signed Contribution Agreement to NPT. 	<p>Initiate process as early as possible</p> <p>If shipping via USPS, package must be postmarked by December 31</p> <p>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, December 30</p>

* To receive a 2024 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.