



Contribution Agreement

Complete this form to notify National Philanthropic Trust of your intent to make an initial contribution of \$25,000 or more, or an additional contribution of \$1,000 or more, to your donor-advised fund. Please work with the institution where your assets are currently held to initiate the transfer.

Please refer to the NPT Funding Instructions for specific transfer information. You may download the instructions from the NPT DonorView Forms/Resources tab, request a copy from your Wells Fargo relationship manager/advisor, or contact (855) 435-4108 or Philanthropic@wellsfargo.com.

Note: National Philanthropic Trust 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.

If you need assistance, call (888) 420-3572 or send an email to wfdaf@nptrust.org.

1. Donor-Advised Fund Information

Donor-Advised Fund Name

Donor-Advised Fund Account Number

Primary/Joint/Secondary Advisor (First Name, MI, Last Name)

2. Donor Information

Identify the donor(s) of the assets being contributed based on the ownership and/or titling of the delivering account. Complete only the applicable section below. Note: NPT's gift receipt, which is provided for federal tax reporting purposes, will be sent to the person(s), trust, or entity listed below.

Is this a contribution from another donor-advised fund? Yes No

If yes, please skip Section 2 and complete the Grant or Transfer from Private Foundation or Donor-Advised Fund section on page 3. Please enter the donor-advised fund sponsor name in the Transferring Institution blank. Primary/Joint Donor information does not need to be completed, but the Primary/Joint Donor should sign the Contribution Agreement.

Primary Donor

Prefix	First Name, MI, Last Name	Year of Birth
Street Address	City/State	Zip
Email	Phone	

Joint Donor

Prefix	First Name, MI, Last Name	Year of Birth
Street Address	City/State	Zip
Email	Phone	



2. Donor Information (continued)

Trust

NPT requires either a copy of the trust certificate OR the relevant pages of the trust agreement that substantiate who the trustee(s) is/are and that the named trustee(s) has the authority to make contributions on behalf of the trust. The relevant sections of the trust requested to meet NPT's requirements include the first page of the trust, the signature page and the pages or sections of the trust which detail the dispository provision pursuant to which the distribution to NPT will be made.

Name of Trust Agreement		Year of Trust
Name of Trustee		
Street Address	City/State	Zip
Email	Phone	

Private Foundation or Company Information

Complete below sections if contributed assets are titled in the name of a Private Foundation or Company. Attach NPT Corporate/Organization Resolution and Indemnification form, if applicable.

Company/Organization Name	Employer ID # (if available)	Year of Organization
Street Address	City/State	Zip
Email	Phone	

Authorized Officer

Prefix	First Name, MI, Last Name	Title
Street Address	City/State	Zip
Email	Phone	

3. Contribution Asset Information

NPT can assist with questions regarding asset transfer, but will not initiate the actual transfer. For more information please call (888) 420-3572.

Cash (via ACH/Electronic Funds Transfer)

Dollar Amount \$	Transferring Institution	Last 4 digits of account at transferring institution
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Will any portion of your gift originate from a bank account outside of the U.S? Yes No

Check

Check Amount \$



3. Contribution Asset Information (continued)

Wire

Wire Amount \$ _____ Transferring Institution _____ Last 4 digits of account at transferring institution _____

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

Special instructions apply to wires initiated on wells Fargo.com. Please refer to the NPT Funding Instructions for more information and work with your Wells Fargo relationship manager/advisor to complete.

Grant or Transfer from Private Foundation or Donor-Advised Fund

Estimated Dollar Amount \$ _____ Transferring Institution _____ By Check By Wire

Cash Transfer via ACAT from External Firm or Wells Fargo Advisors (WBS)

Amount \$ _____

Cash Transfer from Wells Fargo Advisors (PCG Only)

Amount \$ _____

Stocks/Bonds/Mutual Funds

If gifting securities, bonds or mutual funds, please complete the section below as well as Letter(s) of Instruction to the delivering firm. Please make copies of this page if there are more than 10 instruments being contributed.

Are you a corporate officer, director or other executive of the stock issuer, or a member of the controlling group or otherwise an affiliate of the stock issuer for any of the securities below? Yes No

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. **Important:** it is NPT's general practice to sell securities upon receipt, so prior to initiating a transfer of the securities, please contact NPT at (888) 420-3572 or wfdaf@npitrust.org for further guidance. 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: Will any portion of your gift originate from an account outside of the U.S? Yes No

Name of Stocks/Bonds/ Mutual Funds	Restricted/ Control	Ticker/ CUSIP	# of Shares	Last 4 Digits of Account and Name of Transferring Institution	Acquisition Date	Estimated Value
	Yes No					
	Yes No					
	Yes No					
	Yes No					
	Yes No					

continued



3. Contribution Asset Information (continued)

Stocks/Bonds/Mutual Funds

Name of Stocks/Bonds/ Mutual Funds	Restricted/ Control	Ticker/ CUSIP	# of Shares	Last 4 Digits of Account and Name of Transferring Institution	Acquisition Date	Estimated Value
	Yes No					
	Yes No					
	Yes No					
	Yes No					
	Yes No					

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

Physical Certificates and Other Non-Cash Asset Types

Further documentation will be required. For assistance, please call National Philanthropic Trust at (888) 420-3572.

4. Acknowledgement of Terms

I understand that my gift of the property described in Section 3 is an irrevocable and unconditional contribution when received and accepted by National Philanthropic Trust (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 donor-advised fund (DAF). I represent that as of the date of this agreement I am not in possession of any material non-public information with respect to any such contributed securities. Further, I represent that I will not transfer or direct a transfer of securities to NPT, nor will I make any investment recommendation, at a time when I am in possession of any material non-public information with respect to such securities or recommendation. I also agree to provide NPT promptly with all information necessary for NPT to perform its obligations under applicable laws and regulations.

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.

Note: All donors or trustees named in section 2 must sign below. If the contribution is a transfer from a DAF, the Primary/Joint donor should sign.

Donor/Trustee/Authorized Officer

Date

Print Name



4. Acknowledgement of Terms (continued)

Donor/Trustee/Authorized Officer

Date

Print Name

Note: Return this completed form and other required documentation by mail or email:

National Philanthropic Trust | 165 Township Line Road, Suite 1200 | Jenkintown, PA 19046 | wfdaf@nptrust.org

