

# DONOR-ADVISED FUND INVESTMENT REALLOCATION



**INSTRUCTIONS:** Primary, Joint, and authorised Secondary Advisors may recommend an investment allocation by completing this form. If no percentage is indicated, the assets will be held in cash (non-interest bearing). If you wish to change your investment allocation, you can do so by submitting a new Investment Allocation form.

## 1 DONOR-ADVISED FUND INFORMATION

DONOR-ADVISED FUND NAME

DONOR-ADVISED FUND ACCOUNT NUMBER (IF KNOWN)

## 2 INVESTMENT ALLOCATION

Please contact us for investment options.

**Bespoke Investment Request:** £500,000 minimum required. For DAF accounts greater than £500,000, the Primary, Joint, or authorised Secondary Advisors may recommend a third-party investment manager to create a bespoke portfolio to help you meet your philanthropic goals, subject to the approval of NPT UK. Please submit a Bespoke Investment Request.

## 3 ACKNOWLEDGEMENT OF TERMS

I acknowledge and agree that the DAF is offered pursuant to the terms and conditions contained in the NPT UK Donor-Advised Fund Reference Guide. I acknowledge and agree that any contribution is an irrevocable charitable donation when received and accepted by NPT UK, and NPT UK retains exclusive legal control over the contributed assets. Furthermore, I understand and agree that NPT UK has the final approval over any grant and investment allocation recommendations. I hereby certify that, to the best of my knowledge, all information presented in connection with this Investment Allocation Request is accurate, and I will promptly notify NPT UK in writing of any changes.

**Primary Advisor and Joint Advisor, if applicable, are required to sign below.**

PRIMARY/JOINT/AUTHORISED SECONDARY ADVISOR SIGNATURE

DATE (DD/MM/YYYY)

NAME (PRINT)

## RETURN TO [forms@nptuk.org](mailto:forms@nptuk.org)

For more information | [enquiries@nptuk.org](mailto:enquiries@nptuk.org) | +44 (0)800 133 7540 | [www.nptuk.org](http://www.nptuk.org)