

DONOR-ADVISED FUND UPDATE



INSTRUCTIONS: Update your Donor-Advised Fund (DAF) information either by using this form, or by logging on to the donor portal at nptukgiving.org and selecting **Update Account**. You can change the DAF name, contact information, advisors, or successors for an existing DAF. It is not necessary to enter information that has not changed. Please note: if you are adding new advisor(s), we will require scanned copies of the passports of the primary, joint and secondary advisors if you select full access.

1 Current Donor-Advised Fund Information

Donor-Advised Fund Name

Donor-Advised Fund Account Number (if known)

Primary or Joint Account Advisor

2 Donor-Advised Fund Name Update

New Donor-Advised Fund Name

3 Primary and Joint Advisors

Primary Advisor Update

Any changes to the Primary Advisor's address will become your DAF's primary address for all correspondence unless otherwise noted.

Title	First Name	Last Name	Year of Birth
Telephone (for online access)		Email (for online access)	
Address	City	Postcode	Country

Joint Advisor Update

A Joint Advisor must consent to their removal by signing where indicated. **Note:** only one Joint Advisor is permitted per account.

Update Delete Add

Title	First Name	Last Name	Year of Birth
Telephone (for online access)		Email (for online access)	
Address	City	Postcode	Country

If removing a Joint Advisor:

I consent to my removal as a Joint Advisor

Joint Advisor Signature

4 Secondary Advisor(s)

Update	Delete	Add	Change Access	
Title	First Name		Last Name	Year of Birth
Telephone (for online access)		Email (for online access)		
Address		City	Postcode	Country

Secondary Advisor is authorised to:

Read-only access: Permits Secondary Advisor to view DAF information online

Full Access: Permits Secondary Advisor to recommend investment allocations and grants

Update	Delete	Add	Change Access	
Title	First Name		Last Name	Year of Birth
Telephone (for online access)		Email (for online access)		
Address		City	Postcode	Country

Secondary Advisor is authorised to:

Read-only access: Permits Secondary Advisor to view DAF information online

Full Access: Permits Secondary Advisor to recommend investment allocations and grants

5 Succession Plan

You may name individuals as Successor Advisors to succeed the Primary and Joint Advisors upon their death and/or you may name Charitable Beneficiaries to receive DAF assets following the death of the Primary and Joint Advisors. You may name Successor Advisors on the existing DAF or instruct that new DAFs be created for Successor Advisors. If allocated to a new DAF, the new DAF must be funded with a minimum of £250,000. **THE COMBINED PERCENTAGE ALLOCATION MUST TOTAL 100%.** Please make copies of this page if you wish to designate more than four Successor Advisors.

Option A – Successor Advisors

%				
TO BE RETAINED IN EXISTING DAF		TO BE ALLOCATED TO A NEW DAF		
Successor Advisor 1				
Title	First Name		Last Name	Year of Birth
Telephone		Email		
Address		City	Postcode	Country

TO BE RETAINED IN EXISTING DAF		TO BE ALLOCATED TO A NEW DAF		
Successor Advisor 2				
Title	First Name		Last Name	Year of Birth
Telephone		Email		
Address		City	Postcode	Country

5 Succession Plan (Continued)

TO BE RETAINED IN EXISTING DAF

TO BE ALLOCATED TO A NEW DAF

Successor Advisor 3

Title	First Name	Last Name	Year of Birth
Telephone	Email		
Address	City	Postcode	Country

TO BE RETAINED IN EXISTING DAF

TO BE ALLOCATED TO A NEW DAF

Successor Advisor 4

Title	First Name	Last Name	Year of Birth
Telephone	Email		
Address	City	Postcode	Country

Option B – Charitable Beneficiaries

%

Designate one or more charities to receive a lump-sum grant at the time of Succession Plan activation. If a charitable beneficiary is not eligible to receive a grant at the time of Succession Plan activation, designated assets will be reallocated among the remaining charities. Please make copies of this page if you wish to designate more than four Charitable Beneficiaries.

Charitable Beneficiary 1 %

Charity Name			
Telephone	Charity Number		
Address	City	Postcode	Country

Charitable Beneficiary 2 %

Charity Name			
Telephone	Charity Number		
Address	City	Postcode	Country

5 Succession Plan (Continued)

Charitable Beneficiary 3 %

Charity Name

Telephone

Charity Number

Address

City

Postcode

Country

Charitable Beneficiary 4 %

Charity Name

Telephone

Charity Number

Address

City

Postcode

Country

% OPTION A – SUCCESSOR ADVISORS

% OPTION B – CHARITABLE BENEFICIARIES

TOTAL: 100%

6 Acknowledgement of Terms

I understand that these changes will be subject to all terms that apply to the DAF. I certify that, to the best of my knowledge, all information in connection with this form is accurate and I will notify NPT UK in writing of any changes.

Primary or Joint Advisor Signature

Primary or Joint Advisor Print Name

Date (DD/MM/YYYY)

Return to: forms@nptuk.org

For more information | enquiries@nptuk.org | +44 (0)800 133 7540 | www.nptuk.org