

# BESPOKE INVESTMENT RECOMMENDATION



For donor-advised funds (DAFs) with a balance of £500,000 or more you may recommend an independent investment advisor to develop and implement investment strategies or specific securities for your DAF, subject to NPT UK's review and approval. Investments are required to conform to NPT UK's Investment Policy Guidelines upon initial investment and on an ongoing basis.

## 1 DONOR-ADVISED FUND INFORMATION

DONOR-ADVISED FUND NAME

DONOR-ADVISED FUND ACCOUNT NUMBER (IF KNOWN)

## 2 INVESTMENT MANAGER/ADVISOR

INSTITUTION NAME

STREET ADDRESS

CITY

POSTAL CODE

CONTACT NAME

EMAIL

INSTITUTION THAT WILL CUSTODY ASSETS

## 3 INVESTMENT DETAILS

### DISCRETIONARY INVESTMENT STRATEGY

Please detail the strategy, including benchmarks and fees (please attach additional information if needed).

### NON-DISCRETIONARY/SPECIFIC TRANSACTIONS

NAME	IDENTIFIER	STOCK EXCHANGE	PERCENT ALLOCATION
			%
			%
			%
			%
			%
			<b>TOTAL 100%</b>

## 4 ACKNOWLEDGEMENT OF TERMS

I understand that my gifts of assets are irrevocable and unconditional contributions when received and accepted by NPT UK, and that NPT UK retains exclusive legal control over contributed assets. I acknowledge that NPT UK will take under advisement the investment recommendation, but reserves the right to change the investment allocation under any circumstances. I certify that, to the best of my knowledge, all information in connection with this investment recommendation form is accurate, that it is a recommendation subject to NPT UK's review and approval, and that all transactions executed by NPT UK are final. I acknowledge that I have read the NPT UK Donor-Advised Fund Reference Guide and agree to the terms and/or conditions contained therein, and that I will notify NPT UK in writing of any changes.

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)