

# DONOR-ADVISED FUND CONTRIBUTION AGREEMENT



**INSTRUCTIONS:** Complete this form to make an initial contribution of £250,000 or more, or an additional contribution of £2,000 or more to your Donor-Advised Fund. Asset transfer instructions can be found on the *How to Make a Contribution* form.

## 1 DONOR-ADVISED FUND INFORMATION

Identify the donor-advised fund account to which the donated assets will be added.

DONOR-ADVISED FUND NAME

DONOR-ADVISED FUND ACCOUNT NUMBER (IF KNOWN)

## 2 DONOR INFORMATION

Identify the registered owner of the assets being donated. A contribution receipt, which is provided for tax reporting purposes, will be sent to the person or legal entity listed in this section.

### INDIVIDUAL

NAME (FIRST, MIDDLE INITIAL, LAST)

STREET ADDRESS

CITY

POSTAL CODE

COUNTRY

PRIMARY TELEPHONE NUMBER

EMAIL

DATE OF BIRTH (DD/MM/YYYY)

### LEGAL ENTITY

Identify the type of entity that owns the assets being donated. Additional documentation may be required.

- Corporation
- Partnership
- Limited Liability Company
- Trust (non-charitable)
- Charitable Entity (including Charitable Trusts)

OTHER (PLEASE SPECIFY)

LEGAL ENTITY NAME

YEAR OF ORGANISATION

STREET ADDRESS

CITY

POSTAL CODE

COUNTRY

ID NUMBER

PRIMARY CONTACT NAME

POSITION OF PRIMARY CONTACT

PRIMARY CONTACT EMAIL

PRIMARY CONTACT TELEPHONE

## 3 CONTRIBUTION ASSET INFORMATION

Please indicate the type(s) and the amount of your gift. For specific bank transfer/wire transfer instructions, please see the document *How to Make a Contribution* or contact NPT UK.

### CASH

#### If gifting cash:

- Bank Transfer/Wire
- Other (contact NPT UK)

£ AMOUNT OF TRANSFER (GBP)

AMOUNT OF TRANSFER (IF OTHER THAN GBP) CURRENCY

ACCOUNT NAME AT TRANSFERRING INSTITUTION

ACCOUNT NUMBER AT TRANSFERRING INSTITUTION (OPTIONAL)

TRANSFERRING INSTITUTION

COUNTRY OF TRANSFERRING INSTITUTION

#### If gifting cash from another donor-advised fund or charitable entity:

- Bank Transfer/Wire
- Other (contact NPT UK)

£ AMOUNT OF TRANSFER (GBP)

AMOUNT OF TRANSFER (IF OTHER THAN GBP) CURRENCY

TRANSFERRING INSTITUTION

COUNTRY OF TRANSFERRING INSTITUTION

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## CONTRIBUTION ASSET INFORMATION (continued)

### SHARES AND OTHER PUBLICLY TRADED SECURITIES

If gifting shares or other securities, please complete the section below.

Check all that apply:

There are restrictions on the disposal of shares.

The shares being contributed are listed on a public exchange and you are 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 the securities.

The shares being contributed are listed on a U.S. exchange and the securities are restricted or control securities and subject to: Rule 144, 144A, 145, 701 or Regulation S of the U.S. Securities Act of 1993, as amended, an effective registration, and/or any contractual limitation.

If you check any of the above, please also indicate "Restricted Control" next to the specific security below and please contact NPT UK.

NAME OF SECURITY

NAME OF SECURITY

SYMBOL/SEDOL/CUSIP/ISIN

NUMBER OF SHARES/UNITS

SYMBOL/SEDOL/CUSIP/ISIN

NUMBER OF SHARES/UNITS

NAME OF TRANSFERRING INSTITUTION

NAME OF TRANSFERRING INSTITUTION

COUNTRY OF TRANSFERRING INSTITUTION

COUNTRY OF TRANSFERRING INSTITUTION

ACCOUNT NAME AT TRANSFERRING INSTITUTION

ACCOUNT NAME AT TRANSFERRING INSTITUTION

RESTRICTED CONTROL YES

RESTRICTED CONTROL YES

NAME OF SECURITY

NAME OF SECURITY

SYMBOL/SEDOL/CUSIP/ISIN

NUMBER OF SHARES/UNITS

SYMBOL/SEDOL/CUSIP/ISIN

NUMBER OF SHARES/UNITS

NAME OF TRANSFERRING INSTITUTION

NAME OF TRANSFERRING INSTITUTION

COUNTRY OF TRANSFERRING INSTITUTION

COUNTRY OF TRANSFERRING INSTITUTION

ACCOUNT NAME AT TRANSFERRING INSTITUTION

ACCOUNT NAME AT TRANSFERRING INSTITUTION

RESTRICTED CONTROL YES

RESTRICTED CONTROL YES

### GIFTS OF OTHER TYPES OF ASSETS

Other types of gifts may include property, alternative investments (hedge fund or private equity interests), and other types of privately-held assets. Please contact NPT UK for assistance.

DESCRIPTION OF ASSET

## ACKNOWLEDGEMENT OF TERMS

On behalf of myself and, if applicable, the organisation for which I serve as Primary Contact, I understand that the gift of the asset described in the Contribution Asset Information Section is an irrevocable and unconditional contribution when received and accepted by NPT UK, and that NPT UK retains exclusive legal control over the contributed assets. I acknowledge that I have read the Donor Reference Guide and that I and, if applicable, the organisation for which I serve as Primary Contact, agree that the donor-advised fund is offered pursuant to the terms and conditions contained therein. In accordance with Know Your Client/Anti-Money Laundering procedures, NPT UK will obtain and verify information that identifies each person who makes a contribution to a donor-advised fund. I certify that, to the best of my knowledge, all information in connection with this Contribution Agreement is accurate, and I will notify NPT UK in writing of any changes.

The asset owner identified in Section 2 is required to sign below.

SIGNATURE (DONOR/AUTHORISED SIGNATORY)

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) | [www.nptuk.org](http://www.nptuk.org)