

# DONOR-ADVISED FUND UPDATE

**INSTRUCTIONS:** Complete this form to update your donor-advised fund information. You can change the fund name, contact information, advisors or successors for an existing donor-advised fund. 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 Account Currency

Choose the account currency for the DAF:      ☐ GBP      ☐ USD      ☐ Both GBP and USD

Each NPT Transatlantic donor-advised fund includes a GBP account and a USD account. If GBP is chosen above, the GBP account will be the principal account and any contributions received in USD will be transferred to the GBP account. If USD is chosen above, the USD account will be the principal account and any contributions received in GBP (including Gift Aid) will be transferred to the USD account. If you choose both, we understand that you wish to accumulate balances in both the GBP and USD accounts. GBP contributions will remain in the GBP account and USD contributions will remain in the USD account. If you choose both, standard charitable administration fees apply to each account.

## 4 Primary and Joint Advisors

### Primary Advisor Update

          

Title      First Name      Last Name      Year of Birth

Telephone (for online access)      Email (for online access)

Address      City      State (US Only)      Postcode      Country

### Joint Advisor Update

          

Title      First Name      Last Name      Year of Birth

Telephone (for online access)      Email (for online access)

Address      City      State (US Only)      Postcode      Country

## 5 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      State (US Only)      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      State (US Only)      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

## 6 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. **THE COMBINED PERCENTAGE ALLOCATION MUST TOTAL 100%**

### % TO BE RETAINED IN EXISTING DAF

#### SUCCESSOR ADVISOR

Title      First Name      Last Name      Year of Birth

Telephone      Email

Address      City      State (US Only)      Postcode      Country

#### SUCCESSOR ADVISOR

Title      First Name      Last Name      Year of Birth

Telephone      Email

Address      City      State (US Only)      Postcode      Country

## 6 Succession Plan (Continued)

**% TO BE ALLOCATED IN A NEW DAF:** Each new DAF must be funded with £50,000 or \$80,000.

### SUCCESSOR ADVISOR

Title First Name Last Name Year of Birth

Telephone Email

Address City State (US Only) Postcode Country

**% TO BE ALLOCATED IN A NEW DAF:** Each new DAF must be funded with £50,000 or \$80,000.

### SUCCESSOR ADVISOR

Title First Name Last Name Year of Birth

Telephone Email

Address City State (US Only) Postcode Country

### 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.

**% TO BE ALLOCATED TO A CHARITABLE BENEFICIARY**

### CHARITABLE BENEFICIARY

Charity Name

Telephone Charity Number (EIN for US charity)

Address City State (US Only) Postcode Country

**% TO BE ALLOCATED TO A CHARITABLE BENEFICIARY**

### CHARITABLE BENEFICIARY

Charity Name

Telephone Charity Number (EIN for US Charity)

Address City State (US Only) Postcode Country

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## 6 Succession Plan (Continued)

### % TO BE ALLOCATED TO A CHARITABLE BENEFICIARY

#### CHARITABLE BENEFICIARY

Charity Name

Telephone

Charity Number (EIN for US Charity)

Address

City

State (US Only)

Postcode

Country

### % TO BE ALLOCATED TO A CHARITABLE BENEFICIARY

#### CHARITABLE BENEFICIARY

Charity Name

Telephone

Charity Number (EIN for US Charity)

Address

City

State (US Only)

Postcode

Country

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## 7 Acknowledgement of Terms

I/we understand that these changes will be subject to all terms that apply to the donor-advised fund. I certify that, to the best of my knowledge, all information in connection with this form is accurate and I will notify NPT Transatlantic in writing of any changes.

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**Primary or Joint Advisor Signature**

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Primary or Joint Advisor Print Name

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Date (DD/MM/YYYY)

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**Return to:** [forms@npttransatlantic.org](mailto:forms@npttransatlantic.org)

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