

DONOR-ADVISED FUND CONTRIBUTION AGREEMENT

INSTRUCTIONS: Please provide a Contribution Agreement each time you contribute to your donor-advised fund (DAF) account. If you are making an initial contribution to establish your DAF, the minimum is £50,000/\$80,000. If you are making an additional contribution to your DAF, the minimum is £2,000/\$3,200. NPT Transatlantic recommends completing this contribution agreement in advance of submitting assets.

Asset transfer instructions can be found on the **How to Make a Contribution** or contact NPT Transatlantic.

If you need assistance, call +44 (0)800 133 7540 or email enquiries@nptuk.org.

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

Title First Name Last Name

Telephone Email

Address City State (US Only) Postcode Country

Legal Entity

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

Legal Entity Name Year of Organisation

Address City State (US Only) Postcode Country

ID Number (EIN if in US) Primary Contact Name Position of Primary Contact

Primary Contact Email Primary Contact Telephone

- Corporation
- Partnership
- Limited Liability Company
- Trust (non-charitable)
- Charitable Entity (including Charitable Trusts and Donor-Advised Funds)
If this charitable entity is a US private foundation, please also tick this box
- Other (please specify)

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 Transatlantic.

Cash

If gifting cash:

- Bank Transfer/Wire
- Other (Contact NPT Transatlantic)

Amount of Transfer (GBP)

Amount of Transfer (USD)

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 Transatlantic)

Amount of Transfer (GBP)

Amount of Transfer (USD)

Account Name at Transferring Institution

Transferring Institution

Country of Transferring Institution

Gift Aid Declaration

Please tick the box if you wish to make a Gift Aid Declaration. This allows NPT UK to claim Gift Aid on your cash contribution listed above. The Gift Aid reclaim amount will be added to the DAF account.

Yes, I am a UK taxpayer, and I would like NPT UK to reclaim the tax on this donation. NPT UK will reclaim 25p on every £1 donated. I understand that if I pay less Income Tax and/or Capital Gains Tax in the current tax year than the amount of Gift Aid claimed on all my donations it is my responsibility to pay any difference.

If you pay Income Tax at the higher or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid donations on your Self-Assessment tax return or ask HM Revenue and Customs to adjust your tax code.

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 or have been in the last 90 days 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 Transatlantic.

Name of Stock/Bond/Mutual Fund

Symbol/SEDOL/CUSIP/ISIN

Number of Shares/Units

Name of Transferring Institution

Country of Transferring Institution

Account Name at Transferring Institution

Restricted Control

Yes

3 Contribution Asset Information

Name of Security	SEDOL/CUSIP/ISIN	Number of Shares/Units
Name of Transferring Institution	Country of Transferring Institution	
Account Name at Transferring Institution		Restricted Control Yes
Name of Security	SEDOL/CUSIP/ISIN	Number of Shares/Units
Name of Transferring Institution	Country of Transferring Institution	
Account Name at Transferring Institution		Restricted Control Yes
Name of Security	SEDOL/CUSIP/ISIN	Number of Shares/Units
Name of Transferring Institution	Country of Transferring Institution	
Account Name at Transferring Institution		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 Transatlantic for assistance.

Description of Asset

4 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 property described in the Contribution Asset Information Section is an irrevocable and unconditional contribution when received and accepted by NPT Transatlantic, and that NPT Transatlantic retains exclusive legal control over the contributed assets. I acknowledge that I have read the **Donor-Advised Fund 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 Transatlantic 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 Transatlantic in writing of any changes.

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

Signature (Donor/Trustee/Primary Contact)

Print Name

Date (DD/MM/YYYY)

Return to: forms@npttransatlantic.org

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