

DONOR-ADVISED FUND GRANT RECOMMENDATION

INSTRUCTIONS: You may recommend a grant of £200 or more (or \$320 or more) from your donor-advised fund (DAF) to support a qualified charity by either using this form or logging onto the donor portal.

1 Donor-Advised Fund Information

Donor-Advised Fund Name

Donor-Advised Fund Account Number (if known)

2 Select a Charity

Charity Name

Address

City

Postcode

Country

Charity Number

Website

Contact person at charity

Telephone

Email

3 Choose Recognition Preference

A letter accompanying your grant will be sent to your selected charity. Please indicate your preference for recognition.

Recognise Fund Name and Donor (default if no box is checked)

Anonymous

4 Grant Details

NPT Transatlantic processes grant recommendations throughout the week so that the recipient charity may benefit from your generosity as soon as possible. NPT Transatlantic must complete a satisfactory grant due diligence process and approved grants are typically sent within 3-5 days. If NPT Transatlantic needs additional information, the recommendation is made close to a holiday or the grant will close the account, there may be a slight delay.

Timing

One-time Grant: Issue the approved grant as soon as possible

Recurring Grant: Issue the approved grant on a recurring basis as indicated below for the amount listed above.

(Note: Recurring grants may be discontinued for insufficient funds, or if a notice to suspend is received.)

Monthly

Quarterly

Every 6 months

Annually

Beginning (DD/MM/YYYY)

Ending (DD/MM/YYYY)

Grant Amount (£200/\$320 Minimum)

Currency:

GBP

USD

Other

Further gift aid cannot be claimed by the charity on the above grant amount.

4 Grant Details (Continued)

Purpose of Grant

In furtherance of the charitable purposes of the grantee organisation (default if no box is checked)
Other

Special Notes

If you wish for your contact information to be given to the charity, please provide it in Special Notes section above.

5 Acknowledgement of Terms

I understand that this is a recommendation and not a direction. I further understand that NPT Transatlantic reviews all grants to ensure that the organisation is a qualified charity under relevant UK and US regulations, and that the purpose of the grant is charitable in nature. NPT Transatlantic may deny a recommendation if the grant does not meet criteria for approval. By signing below, I acknowledge that:

- The grant will not pay for attendance at a charitable event (e.g. gala, luncheon, golf outing, auction).
- The grant will not pay for goods/services, or any other benefit for myself or any specific individual (e.g. auction item, membership fee, dues, tuition).
- The grant will not be used to support a political campaign or lobbying activity.
- The grant will not support a private non-operating foundation.
- The donor received a charitable deduction upon contributing assets to the donor-advised fund and no one will claim an additional deduction for this grant.

Primary/Joint/Authorised Secondary Advisor Signature

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