

DONOR-ADVISED FUND UPDATE



INSTRUCTIONS: Update your donor-advised fund information either by using this form, or by logging on to the donor portal at nptukgiving.org and selecting **Update Account**. You can change the donor-advised 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 Primary and Joint Advisors

Primary Advisor Update

Any changes to the Primary Advisor's address will become your donor-advised fund's primary address for all correspondence unless otherwise noted.

Update

Title	First Name	Last Name	Year of Birth
Telephone (for online access)	Email (for online access)		
Address	City	Postcode	Country

Joint Advisor Update

Update

Title	First Name	Last Name	Year of Birth
Telephone (for online access)	Email (for online access)		
Address	City	Postcode	Country

4 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	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	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

5 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	Postcode	Country

Title	First Name	Last Name	Year of Birth
Telephone		Email	
Address	City	Postcode	Country

5 Succession Plan (Continued)

% TO BE ALLOCATED IN A NEW DAF: Each new DAF must be funded with £250,000.

SUCCESSOR ADVISOR

Title	First Name	Last Name	Year of Birth
Telephone		Email	
Address	City	Postcode	Country

% TO BE ALLOCATED IN A NEW DAF: Each new DAF must be funded with £250,000.

SUCCESSOR ADVISOR

Title	First Name	Last Name	Year of Birth
Telephone		Email	
Address	City	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		
Address	City	Postcode	Country

% TO BE ALLOCATED TO A CHARITABLE BENEFICIARY

CHARITABLE BENEFICIARY

Charity Name			
Telephone	Charity Number		
Address	City	Postcode	Country

5 Succession Plan (Continued)**% TO BE ALLOCATED TO A CHARITABLE BENEFICIARY****CHARITABLE BENEFICIARY**

Charity Name

Telephone

Charity Number

Address

City

Postcode

Country

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

Charity Name

Telephone

Charity Number

Address

City

Postcode

Country

6 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 UK in writing of any changes.

Primary or Joint Advisor Signature

Primary or Joint Advisor Print Name

Date (DD/MM/YYYY)

Return to: forms@nptuk.orgFor more information | enquiries@nptuk.org | +44 (0)800 133 7540 | www.nptuk.org