

# DONOR-ADVISED FUND GRANT RECOMMENDATION



**INSTRUCTIONS:** You may recommend a grant of £200 or more from your donor-advised fund (DAF) to support a qualified charity, by either using this form, or logging on to the donor portal at [nptukgiving.org](https://nptukgiving.org).

## 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.

Fund Name & Donor Name(s)  
Fund Name

Donor Name(s)  
Anonymous

You may also indicate others to be acknowledged with this grant, regardless of the recognition choices made above.

In honor of

In memory of

In recognition of

Solicited by

## 4 Grant Details

NPT UK processes grant recommendations throughout the week so that the recipient charity may benefit from your generosity as soon as possible. NPT UK must complete a satisfactory grant due diligence process and approved grants are typically sent within 3-5 days. If NPT UK 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)

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## 4 Grant Details (Continued)

**Grant Amount** (£200 Minimum)

**Currency:**

GBP      USD      Other

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

**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.

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## 5 Acknowledgement of Terms

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

- 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, school fees, tuition).
- The grant will not be used to support a political campaign or lobbying activity.
- 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.

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**Primary/Joint/Authorised Secondary Advisor Signature**

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Print Name

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Date (DD/MM/YYYY)

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

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