



National  
Philanthropic  
Trust

*Your partner in giving*

# Contribution Agreement

Complete this form to make a contribution to the **Rebuild Collaborative Fund**, an advised fund administered by National Philanthropic Trust. (Minimum contribution \$1,500.) If you need assistance, call toll-free at (888) 878-7900 or send an email to [npt@nptrust.org](mailto:npt@nptrust.org).

## 1. Advised Fund Information

Rebuild Collaborative Fund  
Advised Fund Name

William Penn Foundation  
Primary Advisor

## 2. Donor Information

Identify all registered owners of the assets being donated. Note: NPT's gift receipt, which is provided for federal tax reporting purposes, will be sent to the person(s) or trust listed below.

**Primary Donor**      Mr.      Mrs.      Ms.      Dr.

\_\_\_\_\_  
First Name, MI, Last Name      \_\_\_\_\_  
Year of Birth

\_\_\_\_\_  
Street Address      \_\_\_\_\_  
City/State      \_\_\_\_\_  
Zip

\_\_\_\_\_  
Email      \_\_\_\_\_  
Primary Telephone #

**Joint Owner**      Mr.      Mrs.      Ms.      Dr.

\_\_\_\_\_  
First Name, MI, Last Name      \_\_\_\_\_  
Year of Birth

\_\_\_\_\_  
Street Address      \_\_\_\_\_  
City/State      \_\_\_\_\_  
Zip

\_\_\_\_\_  
Email      \_\_\_\_\_  
Primary Telephone #

### Organizational Donor

\_\_\_\_\_  
Name of Entity      \_\_\_\_\_  
Tax ID #

\_\_\_\_\_  
Street Address      \_\_\_\_\_  
City/State      \_\_\_\_\_  
Zip

\_\_\_\_\_  
Type of Entity (Foundation, Corporation, Trust)      \_\_\_\_\_  
Email

**Trust** (A copy of the Trust Agreement with any amendments must accompany all initial contributions from trusts.)

\_\_\_\_\_  
Name of Trust Agreement

\_\_\_\_\_  
Taxpayer Identification Number      \_\_\_\_\_  
Trust Date

\_\_\_\_\_  
Trustee (First Name, MI, Last Name)      \_\_\_\_\_  
Primary Telephone #

### 3. Transfer Instructions

Check	Cash	Stock, Mutual Funds, Bonds
<p><b>Make payable to:</b> National Philanthropic Trust</p> <p><b>Mail to:</b> National Philanthropic Trust 165 Township Line Road Suite 1200 Jenkintown, PA 19046</p> <p><b>Tax ID#:</b> 23-7825575</p>	<p><b>Bank:</b> UBS AG</p> <p><b>ABA #</b> 026007993</p> <p><b>SWIFT Code:</b> UBSWUS33</p> <p><b>Address:</b> 677 Washington Blvd., Stamford, CT 06901</p> <p><b>A/C Title:</b> UBS Financial Services</p> <p><b>A/C Number:</b> 101-WA-258641-000</p> <p><b>F/C A/C Title:</b> National Philanthropic Trust</p> <p><b>F/C A/C Number:</b> UT51093</p>	<p><b>Brokerage Firm:</b> UBS Financial Services</p> <p><b>For Benefit of:</b> National Philanthropic Trust</p> <p><b>DTC Number:</b> 0221</p> <p><b>A/C Title:</b> National Philanthropic Trust</p> <p><b>A/C Number:</b> UT51093</p>

### 4. Assets

Call (888) 878-7900 if you need assistance. If you are transferring stock, mutual funds or bonds, attach a **copy** of the "Letter of Authorization" indicating where the assets are held. Send the **original** "Letter of Authorization" to the firm at which the assets are held.

#### Cash

\$ \_\_\_\_\_  
Dollar Amount

By Check

By Wire

#### Stock

\_\_\_\_\_  
Name of Stock

\_\_\_\_\_  
Trading Symbol

\_\_\_\_\_  
# of Shares

\_\_\_\_\_  
Name of Stock

\_\_\_\_\_  
Trading Symbol

\_\_\_\_\_  
# of Shares

\_\_\_\_\_  
Name of Stock

\_\_\_\_\_  
Trading Symbol

\_\_\_\_\_  
# of Shares

#### Mutual Funds

\_\_\_\_\_  
Name of Mutual Fund

\_\_\_\_\_  
Trading Symbol

\_\_\_\_\_  
# of Shares

\_\_\_\_\_  
Name of Mutual Fund

\_\_\_\_\_  
Trading Symbol

\_\_\_\_\_  
# of Shares

\_\_\_\_\_  
Name of Mutual Fund

\_\_\_\_\_  
Trading Symbol

\_\_\_\_\_  
# of Shares

#### 4. Assets (continued)

##### Bonds

_____ Name of Bond	_____ CUSIP	_____ Quantity or Face Amount
_____ Name of Bond	_____ CUSIP	_____ Quantity or Face Amount
_____ Name of Bond	_____ CUSIP	_____ Quantity or Face Amount

##### Physical Certificates

Mail Physical Certificate and Irrevocable Stock or Bond Power with medallion guarantee under separate cover to National Philanthropic Trust at the address below.

##### Restricted Stock, Privately Held Stock and Real Estate

For assistance, please call National Philanthropic Trust toll-free at (888) 878-7900.

##### Grant or Transfer from Private Foundation or Donor-Advised Fund

\$ \_\_\_\_\_                                      By Check                                      By Wire  
Estimated Dollar Amount

#### 5. Acknowledgement of Terms (All donors or trustees named in Section 2 must sign below)

I understand that my gift of the property described in **Section 4** is an irrevocable and unconditional contribution when received and accepted by National Philanthropic Trust (NPT) and that NPT retains exclusive legal control over the contributed assets, and will be used to support a granting program through the Rebuild Collaborative Fund. I acknowledge that the Rebuild Collaborative Fund advisors have sole discretion over recommending grants made from this fund. I understand and agree that NPT will disclose my identity, contact information, and the amount of my contribution to the William Penn Foundation, PIDC Community Capital and/or the City of Philadelphia's Rebuilding Community Infrastructure Office. I further understand that the advisors also have sole discretion in making recommendations regarding the investment selection for the fund. I certify that, to the best of my knowledge, all information enclosed is accurate and I will notify NPT in writing of any changes.

_____ Donor or Trustee	_____ Date
_____ Donor or Trustee	_____ Date

#### 6. Return this completed form and other required documentation by mail, fax or email to:

National Philanthropic Trust | 165 Township Line Road, Suite 1200 | Jenkintown, PA 19046  
Fax: (215) 277-3029 | Email: [npt@npitrust.org](mailto:npt@npitrust.org).