

Bequest Gift Notification

Complete this form to make a bequest from your will, IRA, 401(k) or other qualified plan, trust, or insurance policy upon your death to a new or existing donor-advised fund with NPT Charitable Asset Trust (NPT CAT). Additional forms are available at www.nptcat.org. If you need assistance, call toll free at (855) 536-1210 or send an email to nptcat@nptcat.org.

1. Donor-Advised Fund Information

Donor-Advised Fund Name

Primary Advisor

2. Donor Information

Identify all registered owners of the assets being donated. If the donor is a trust, enter the name of the trust agreement, the taxpayer identification number, and the date of the trust agreement directly below. All owners, joint owners, trustees, and co-trustees should complete the rest of Section 2.

Trust

Name of Trust Agreement

Taxpayer Identification Number

Trust Date (Month, Day, Year)

Donor 1 Mr. Mrs. Ms. Dr.

Owner, Trustee, or Officer (First Name, MI, Last Name)

Date of Birth

Social Security #

Street Address

City/State

Zip

Email

Primary Telephone #

Donor 2 Mr. Mrs. Ms. Dr.

Joint Owner, Co-Trustee, or Officer (First Name, MI, Last Name)

Date of Birth

Social Security #

Street Address

City/State

Zip

Email

Primary Telephone #

3. Type of Gift

Check all boxes that apply to indicate how your gift will be made to NPT CAT upon your death. NPT CAT will place any gift of less than \$5,000 into its General Fund.

- Bequest under a will or codicil
- Distribution from an IRA, 401(k), or other qualified plan
- Distribution from a life insurance policy
- Distribution from trust (e.g. charitable remainder trust)
- Other (please specify) _____

List any beneficiaries, trustees, or other individuals whose interest in your gift precedes that of NPT CAT. List additional names on a separate page.

_____ Name	_____ Social Security #
_____ Name	_____ Social Security #
_____ Name	_____ Social Security #
_____ Name	_____ Social Security #

4. Custodian/Firm Information

Provide information about the firm(s) holding your assets or policy. If you are contributing assets from more than one firm, provide information on a separate page.

_____ Name of Custodian or Firm		
_____ Street Address	_____ City/State	_____ Zip
_____ Contact Name		_____ Primary Phone #
_____ Account #	\$ _____ Dollar Amount	OR _____ % Percentage of Assets

Description of Assets (e.g. various stocks, mutual fund shares, bonds, etc. Attach pages if necessary.)

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 NPT Charitable Asset Trust (NPT CAT), and that NPT CAT retains exclusive legal control over contributed assets. I acknowledge that I have read the NPT CAT Donor Guide and agree to the terms and/or conditions contained therein. I certify that, to the best of my knowledge, all information in connection with this contribution agreement is accurate and I will notify NPT CAT in writing of any changes.

Donor or Trustee

Date

Donor or Trustee

Date

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

NPT Charitable Asset Trust | 165 Township Line Road, Suite 150 | Jenkintown, PA 19046 | Fax: (215) 277-3029