

Grant Recommendation

Complete this form to recommend a grant of \$250 or more from your donor-advised fund to support a public charity. Additional forms are available at www.nptcat.org. If you need assistance, call toll free at (855) 536-1210 or send an email to npt@nptcat.org.

1. Fund Information

Fund Name

Primary Advisor

2. Grant Details

Charity Name

Distribution Amount (\$250 minimum)

Street Address

City/State

Zip

Contact Name

Primary Telephone #

Employer ID # (if known)

Purpose

- Unrestricted (Default if no box is checked) General Operating Expenses Special Project
 Capital Expenditure Other (e.g "in memory of") _____

Recognition

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

- Recognize Fund Name Only (Default if no box is checked)
 Recognize Fund Name and Donor (please specify) _____
 Anonymous Other (please specify) _____

Timing

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.)

____/____/____
Beginning (month/day/year)

____/____/____
Ending (month/day/year)

- Quarterly Semi-Annually Annually

3. Acknowledgement of Terms

I understand that this is a recommendation and not a direction. I further understand that NPT Charitable Asset Trust (NPT CAT) reviews all grants to ensure that the organization is a qualified charity under IRS regulations, and that the purpose of the grant is charitable in nature. NPT CAT may deny a recommendation if the grant does not meet criteria for approval. By signing below, I acknowledge that this grant is not intended to:

- Fulfill an existing pledge. (An existing pledge is one made before this grant has been approved by NPT CAT.)
- Acquire more than an incidental benefit, good or service for any specific individual or myself.
- Pay for dues, membership fees, tuition, goods from charitable auction, or other goods or services.
- Support a political campaign or lobbying activity.
- Support an individual.
- Support a private non-operating foundation.

Primary/Joint/Secondary Advisor Signature

Date (month/day/year)

4. 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