

# Letter of Authorization

Use this form to authorize the electronic transfer of assets to NPT Charitable Asset Trust. When completed and signed, this form will serve as your transfer instructions to the firm holding the assets. Mail the original form to the firm where the assets are held to initiate the transfer. Mail or fax a copy of this form with a completed "**Contribution Agreement**" form to NPT Charitable Asset Trust. Additional forms are available at [www.nptcat.org](http://www.nptcat.org). If you need assistance, call toll free at (855) 536-1210 or send an email to [nptcat@nptcat.org](mailto:nptcat@nptcat.org).

## 1. Current Financial Advisor or Firm Information

_____	_____	
Name of financial advisor/firm holding your securities	Account #	
_____	_____	_____
Street Address	City/State	Zip
_____	_____	
Email	Primary Telephone #	

## 2. Transfer Instructions

Please accept these instructions as the authorization to transfer the assets specified below to NPT Charitable Asset Trust's brokerage account. Important: Securities should be transferred in-kind and are not to be liquidated.

### Stock, Mutual Funds, Bonds

**Forms to be completed:** Contribution Agreement, Letter of Authorization

**DTC Eligible Securities:** Brokerage Firm - UBS Financial Services  
 DTC Number - 0221  
 F/C A/C Title - NPT Charitable Asset Trust  
 F/C A/C Number - PY26935

## 3. Assets

### Stock

_____	_____	_____	<b>OR</b> <input type="checkbox"/> All Shares
Name of Stock	Trading Symbol	# of Shares	
_____	_____	_____	<b>OR</b> <input type="checkbox"/> All Shares
Name of Stock	Trading Symbol	# of Shares	
_____	_____	_____	<b>OR</b> <input type="checkbox"/> All Shares
Name of Stock	Trading Symbol	# of Shares	

**Important:** To transfer shares specified below, attach a recent account statement from the firm at which the shares are held. We suggest you contact NPT Charitable Asset Trust when completing this section to ensure a smooth transfer.

**Mutual Funds**

_____	_____	_____	<b>OR</b>	<input type="checkbox"/> All Shares
Name of Mutual Fund	Trading Symbol	# of Shares		
_____	_____	_____	<b>OR</b>	<input type="checkbox"/> All Shares
Name of Mutual Fund	Trading Symbol	# of Shares		
_____	_____	_____	<b>OR</b>	<input type="checkbox"/> All Shares
Name of Mutual Fund	Trading Symbol	# of Shares		

**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

**4. Acknowledgement of Terms** (This section must be signed by all registered owners of the assets to be donated.)

I hereby irrevocably relinquish all right, title, and interest to the assets specified in Section 3 of this document. I understand that my gifts of property are irrevocable and unconditional contributions when received and accepted by NPT Charitable Asset Trust, and that NPT Charitable Asset Trust retains exclusive legal control over contributed assets. I acknowledge that I have read the NPT Charitable Asset Trust Program Guide and agree to the terms and/or conditions contained therein.

\_\_\_\_\_

Name of Donor-Advised Fund

\_\_\_\_\_

Donor 1 Signature                      Donor 2 Signature (if applicable)                      Date

**5. Medallion Signature Guarantee**

Some assets require a medallion signature guarantee for transfer. Contact your financial advisor to determine if this is required for the transfer of your assets. A medallion signature guarantee can only be obtained from a bank or broker – not from a notary. List additional assets on separate pages, and obtain a medallion signature guarantee on each page.

\_\_\_\_\_

Name, Institution, and Title

\_\_\_\_\_

Signature of Authorized Officer      Date (month/day/year)

Medallion Signature Guarantee  
Required Authorized Officer to Place  
Stamp Here

Applies to all signatures in Section 4

**6. Return this completed form by mail or fax to:**

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