



# Contribution Agreement

## for Private Foundations and Companies

Complete this form to make an initial contribution of **\$25,000 or more**; a transfer of **\$10,000 or more** from an existing donor advised fund or foundation; or an additional contribution of **\$5,000 or more** to your donor advised fund. If you need assistance, call UBS Donor Advised Fund toll-free at **(877) 277-3191** or visit [www.ubs.com/donoradvisedfund](http://www.ubs.com/donoradvisedfund).

### 1. Fund

Fund Name: \_\_\_\_\_

### 2. Company

Identify the company or organization to which the assets being donated belong.

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

Employer Identification Number \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Primary Telephone Number \_\_\_\_\_

### 3. Authorized Officer

Identify the individual who is authorized to donate assets on behalf of the company.

Mr./Mrs./Ms./Dr. \_\_\_\_\_ - -  
Name of Officer (first, middle initial, last) Social Security Number

Address: \_\_\_\_\_ ( ) -  
Primary Telephone Number

City/State/Zip: \_\_\_\_\_ E-mail

### 4. Transfer Instructions

Check	Cash	Stock, Mutual Funds, Bonds
<b>Make payable to:</b> National Philanthropic Trust  <b>Mail to:</b> UBS Donor Advised Fund c/o National Philanthropic Trust 165 Township Line Road, Suite 150 Jenkintown, PA 19046	<b>Bank:</b> UBS AG <b>ABA Number:</b> 026007993 <b>Account Title:</b> UBS Financial Services Inc. <b>Account Number:</b> 01-WA-258641-000 <b>Further Credit Account Number:</b> PY19759 <b>Further Credit Account Title:</b> National Philanthropic Trust	<b>DTC Number:</b> 0221 <b>For Benefit of:</b> National Philanthropic Trust  <b>Further Credit Account Number:</b> PY19759 <b>Further Credit Account Title:</b> National Philanthropic Trust

**5. Assets**

Refer to the instructions provided in **How to Make New or Additional Contributions**, or call UBS Donor Advised Fund for assistance. If you are transferring stock, mutual funds or bonds, attach the appropriate **Letter of Authorization** indicating where the assets are held.

**Cash**

Dollar Amount \$: \_\_\_\_\_  By check  By wire

**Stock**

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

**Mutual Funds**

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

**Bonds**

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 UBS Donor Advised Fund.

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

Please phone UBS Donor Advised Fund toll-free at **(877) 277-3191** for assistance.

**Grant or Transfer from Private Foundation or Donor Advised Fund**

Estimated Dollar Amount \$: \_\_\_\_\_  By check  By wire

**6. Acknowledgement of Terms**

I (We) understand that my (our) gift of the property described in **Section 5** to National Philanthropic Trust (NPT), a 501(c)(3) public charity, is irrevocable and unconditional and that NPT retains exclusive legal control over contributed assets. I (We) acknowledge that I (we) have read the Program Guide and agree to the terms and conditions contained therein. I (We) certify that, to the best of my (our) knowledge, all information enclosed is accurate and I (we) will notify NPT in writing of any changes.

\_\_\_\_\_  
Authorized Officer Signature

\_\_\_\_\_  
Date (month/day/ year)

**7. Return this completed form and other required documentation to:**

**Mail:** UBS Donor Advised Fund  
c/o National Philanthropic Trust  
165 Township Line Road, Suite 150  
Jenkintown, PA 19046

**Fax:** (215) 277-3029