

Complete this form to recommend a grant of \$250 or more from your BMO Donor-Advised Fund to support a qualified public charity. If you need assistance please call (888) 266-4873 or send an e-mail to bmodaf@nptrust.org.

1. Donor-Advised Fund Information

Donor-Advised Fund Name

Donor-Advised Fund Account Number

Primary/Joint/Additional Advisor

Prefix

First Name

MI

Last Name

Suffix

2. Select a Charity

Charity Name

Contact Name

Contact Number

Street Address

City/State

Zip

Tax ID number (if known)

Phone

3. Choose Recognition Preference (please choose one)

NPT will include the following recognition information in the communication sent to the charity.

Recommended by:

Fund Name, Donor Name(s) & Address

Donor Name(s) & Address

Fund Name & Donor Name(s)

Donor Name(s)

Fund Name & Donor Address

Donor Address Only

Fund Name

Anonymous

You may also indicate others to be to be acknowledged with this grant, regardless of the recognition choices made above.

In honor of

In memory of

In recognition of

Solicited by

4. Grant Amount – Indicate the amount of the grant that the organization is to receive.

Amount (\$250 minimum)

5. Select Grant Frequency (please choose either one-time or recurring)

One-time grant

The grant will be sent as soon as administratively feasible unless an alternative date is entered below.

Grant date (month/day/year)

Recurring grant (please select recurring timing)

Monthly Quarterly Semi-annually Annually

Required: Beginning date **Required:** End date

6. Purpose of Grant (please choose one)

Where needed most / Unrestricted / General support
Annual Fund
General scholarship support
Faith-based giving*
Capital campaign
Annual support
Research grant

Disaster relief
Athletic program support
Membership (no benefits)
Fundraising run, walk, etc.
Named scholarship*
Event support (no benefits, not attending)
Other purpose not listed*

**Additional grant purpose details*

7. Acknowledgement of Terms

If I am the primary or joint advisor, I represent and warrant the following about my grant recommendation; or if I am not the primary or joint advisor, I represent and warrant that I am authorized to make the following representations on behalf of the primary and joint advisor:

- The grant will directly and fully support a charitable program.
- The grant will not pay for attendance at a charitable event (e.g. gala, luncheon, golf outing, auction).
- The grant will not pay for goods/services or any other benefit for myself or any specific individual (e.g. auction item, membership fee, dues, tuition).
- The grant will not be used to support a political campaign or lobbying activity.
- The grant will not support a private non-operating foundation.
- The donor received a charitable deduction upon contributing assets to the donor-advised fund and no one will claim an additional deduction for this grant.

By signing on the next page, I acknowledge my understanding that I am submitting a recommendation and not a direction, and that my recommendation is not legally binding on National Philanthropic Trust (NPT). I acknowledge that NPT retains exclusive legal control over contributed assets. I further acknowledge that I have read BMO Donor-Advised Fund's **A Guide to Your Donor-Advised Fund** 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 recommendation is accurate or I will notify NPT in writing of any changes.

If I selected a recognition option other than "Anonymous," I acknowledge that by selecting the recognition option above, I am hereby giving National Philanthropic Trust permission to share with the recommended grantee the name of my BMO Donor-Advised Fund account, my name and/or my address, as indicated above.

7. Acknowledgement of Terms (continued)

If I am a BMO Private Wealth Advisor, I further attest that I am submitting this grant recommendation on behalf of my client and with the full authority for my client, and I understand a notice via email will be sent to the Primary Advisor for this donor-advised fund account.

Primary/Joint/Additional/BMO Private Wealth Advisor Signature

Print Name

Date (MM/DD/YYYY)

RETURN THIS COMPLETED FORM BY EMAIL OR MAIL TO:

BMO Donor-Advised Fund Program c/o National Philanthropic Trust

165 Township Line Road, Suite 1200, Jenkintown, PA 19046 | bmodaf@nptrust.org



The BMO Donor-Advised Fund Program, an initiative of BMO Bank N.A. and various financial service providers of BMO Financial Corp. is administered and sponsored by National Philanthropic Trust, a charitable organization that is exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code ("Code") and classified as a public charity described in Sections 509(a)(1) and 170(b)(1)(A)(vi) of the Code. National Philanthropic Trust is not an affiliate of BMO N.A. or of any BMO Bank N.A. affiliate.

"BMO Wealth Management" is a brand name that refers to BMO Bank N.A. and certain of its affiliates that provide certain investment, investment advisory, trust, banking, and securities products and services. Not all products and services are available in every state and/or location.

Investment Products are: **ARE NOT A DEPOSIT – NOT INSURED BY THE FDIC OR ANY FEDERAL GOVERNMENT AGENCY – NOT GUARANTEED BY ANY BANK – MAY LOSE VALUE.**