

BMO Charitable Fund Program

Letter of Authorization

Use this form to authorize the electronic transfer of assets to the BMO Charitable Fund Program, administered and sponsored by National Philanthropic Trust (NPT). 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 to NPT. Additional forms are available at www.BMOCharitableFund.com. For assistance, please contact NPT's BMO Charitable Fund Program toll-free number at (888) 344-3454.

1. Current Financial Advisor or Firm

Name of Financial Advisor or Firm Holding Your Securities

Account #

Street Address

City

State/Zip

Contact Name

Primary Telephone #

2. Transfer Instructions

Please accept these instructions as the authorization to transfer the assets specified below to NPT'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: National Philanthropic Trust
F/C A/C Number: PY23900

3. Assets

Stock

Name of Stock

Trading Symbol

of Shares

OR All Shares

OR All Shares

OR All Shares

Mutual Funds

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 when completing this section to ensure a smooth transfer.

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

Bonds

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 National Philanthropic Trust (NPT), and that NPT retains exclusive legal control over contributed assets. I acknowledge that I have read the BMO Charitable Fund Program Guidelines and agree to the terms and/or conditions contained therein.

Donor Signature

Date (month/day/year)

Name of Donor-Advised Fund

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 and other required documentation by mail or fax to:

BMO Charitable Fund Program c/o National Philanthropic Trust | 165 Township Line Road, Suite 150 | Jenkintown, PA 19046
Fax: (215) 277-3029