

# J.P. MORGAN CHARITABLE GIVING FUND

## Contribution Agreement

**Instructions:** Please provide a contribution agreement each time you contribute to your J.P. Morgan Charitable Giving Fund, a donor-advised fund (DAF). You may complete the agreement either by using this form or by logging in to [jpmgiving.org](https://jpmgiving.org) and selecting *Contribute to Account*. If you are making an initial contribution to establish your DAF, the minimum is \$10,000. Additional contributions may be made anytime thereafter in amounts of \$5,000 or more. National Philanthropic Trust (NPT) recommends completing the contribution agreement in advance of submitting assets. NPT reserves the right to request a new donor-executed contribution agreement if the contribution is not received within 120 days of submission of the original form. If you need assistance, contact your J.P. Morgan team.

### 1. Donor-Advised Fund Information

Identify the DAF account where the donated assets will be added.

DAF name **Mason Atlas Giving Fund**

DAF account number **XXX791**

### 2. Donor Information

Identify the registered owner(s) of the assets being donated. A Contribution Receipt, which is provided for federal tax reporting purposes, will be made available to the person(s) or trust listed in this section.

#### ■ INDIVIDUAL(S)

Name (first, middle initial, last)

Street address

City

State

Postal code

Primary telephone number

Email

Year of birth (yyyy)

#### ■ TRUST

Name of trust

Year of trust

Trustee name

Trustee email

Street address

City

State

Postal code

Tax ID number/EIN

Name (first, middle initial, last)

Street address

City

State

Postal code

Primary telephone number

Email

Year of birth (yyyy)

#### ■ OTHER LEGAL ENTITY

Legal entity name

Year of organization

Primary contact name

Primary contact email

Street address

City

State

Postal code

Tax ID number/EIN

### 3. Contribution Asset Information

Please indicate the type(s) and the total amount of your gift. For specific instructions regarding each contribution type, see the enclosed document entitled "Charitable Giving Fund Account Funding Instructions," or contact your J.P. Morgan team.

#### ■ CASH

**If gifting cash from an account at J.P. Morgan:**

Amount of transfer \$

Account number at J.P. Morgan

Wire ID/Check number

**If gifting cash from an account outside of J.P. Morgan:**

☐ Check\* ☐ Wire transfer\*\*

Amount of transfer \$

Transferring institution

Account number at transferring institution

Wire ID/Check number

**If gifting cash from another DAF or private foundation:**

☐ Check\* ☐ Wire transfer\*\*

Amount of transfer \$

Transferring institution

Account number at transferring institution

Wire ID/Check Number

#### \* Checks must be payable to

**"National Philanthropic Trust."**

Mail check with Contribution Agreement form to:

The J.P. Morgan Charitable Giving Fund  
c/o National Philanthropic Trust  
165 Township Line Road, Suite 1200  
Jenkintown, PA 19046

\*\* For cash deposits by wire, please have your  
J.P. Morgan team use the following instructions:

JPMorgan Chase Bank, N.A.  
383 Madison Avenue  
New York, NY 10017  
ABA #—021000021  
Account Number—2663423000  
For Account of—The National Philanthropic Trust  
Ref: Apply funds to (name of DAF)

Continued

3. Contribution Asset Information Continued

■ CONTRIBUTIONS OF STOCK

Are any of the securities that you are donating pursuant to this agreement restricted or control securities (as defined in Rule 144 of the US Securities Act of 1933, or the “Securities Act”), and as a condition to future sale into the public market, subject to : (a) reliance on an exemption pursuant to any of Rules 144, 145, or 701 or Regulation S of the Securities Act, or (b) an effective Securities Act registration statement?

☐ Yes ☐ No

Are any of the securities that you are donating pursuant to this agreement subject to any contractual restrictions on donation and/or sale (e.g., lock-ups, restrictions on who may own the securities, bespoke requirements for transfer)?

☐ Yes ☐ No

For any of the securities below, are you or have you been at any point in the last 90 days: an officer, director, 10% shareholder (or otherwise a Rule 144 “affiliate”) of the issuer of the securities?

☐ Yes ☐ No

For any of the securities listed below, are you subject to the issuer’s insider trading policies and/or regulatory black-out periods?

☐ Yes ☐ No

Were any of the securities listed below acquired other than in an open market purchase? For example, were the shares acquired in a private placement, from an affiliate of the issuer, via a pre-IPO investment or as a distribution in kind.

☐ Yes ☐ No

If you answered “Yes” to any of the above questions, please provide the name of the stock(s) and the number of shares being donated as indicated below, and contact your J.P. Morgan Team to complete a Restricted & Control Stock Questionnaire.

Name of stock	# of shares
---------------	-------------

■ STOCKS/BONDS/MUTUAL FUNDS AT J.P. MORGAN

If gifting securities, bonds or mutual funds held **at J.P. Morgan**, please complete the section below. If any assets are held in physical form, an Irrevocable Stock/Bond Power is also required for each asset. Originals should be sent to your J.P. Morgan team.

All trades are transacted in shares only, not in dollar amount. Please note that securities held for less than one year cannot be deducted at full market value.

NAME OF STOCK/BOND/MUTUAL FUND	TICKER/CUSIP	# OF SHARES/ UNITS¹	J.P. MORGAN ACCOUNT# HOLDING ASSET	ACQUISITION DATE

■ STOCKS/BONDS/MUTUAL FUNDS OUTSIDE J.P. MORGAN

If gifting securities, bonds or mutual funds held **outside J.P. Morgan**, please complete the section below as well as Letter(s) of Instruction from your external custodian. If any assets are held in physical form, an Irrevocable Stock/Bond Power is also required for each asset. Originals should be presented to the firm holding the asset(s) and a copy sent to your J.P. Morgan team. Please note that securities held for less than one year cannot be deducted at full market value.

NAME OF STOCK/BOND/MUTUAL FUND	TICKER/CUSIP	# OF SHARES/ UNITS¹	ACCOUNT # AT TRANSFERRING INSTITUTION	ACQUISITION DATE

All **Depository Trust Company-eligible & free transactions** should be directed to:

JPMorgan Chase Bank, N.A.  
DTC Participant Number 0902  
FFC to Account Number—P72500  
For Account Number—PBD# Q63423000  
For Account of National Philanthropic Trust  
Reference (Donor Fund Name)

All **Federal Reserve-eligible U.S. Government transactions** should be directed to:

JPMCHASE/CUST  
ABA# 021 000 021  
FFC to Account Number—P72500  
For Account Number—PBD# Q63423000  
For Account of National Philanthropic Trust  
Reference (Donor Fund Name)

¹Please specify the exact number of shares or units; please do not enter “all.”

# J.P. MORGAN CHARITABLE GIVING FUND

## Contribution Agreement

### Contribution Asset Information Continued

#### ■ PHYSICAL CERTIFICATES

Name of stock

# of shares

Mail **Physical Certificate and Irrevocable Stock or Bond Power** with **Medallion Signature Guarantee** under separate cover to the J.P. Morgan Charitable Giving Fund at the following address:

The J.P. Morgan Charitable Giving Fund  
c/o National Philanthropic Trust  
165 Township Line Road, Suite 1200  
Jenkintown, PA 19046

#### ■ GIFTS OF PRIVATELY HELD STOCK, SPECIALTY ASSETS AND/OR REAL ESTATE

Please contact your J.P. Morgan team for assistance.

Description of asset

### Acknowledgment of Terms and Signatures

By signing below you represent that you will, and undertake to, comply with and fulfill all of your obligations under applicable laws, regulations, and any corporate insider trading policies or procedures to which you may be subject, and will not breach such applicable laws, regulations, or policies and procedures with respect to any contribution to a DAF. You represent that as of the date of this agreement, unless you have informed NPT and J.P. Morgan in writing, you are not in possession of any material non-public information with respect to any such contributed securities. Further, you represent that (i) you will not make any investment recommendation at a time when you are in possession of any material non-public information with respect to such securities, and (ii) will inform NPT and J.P. Morgan in writing if you are in possession of material non-public information with respect to securities and/or their issuer at the time you transfer or direct a transfer of such securities to NPT. You also agree to provide NPT and JPMorgan Chase Bank, N.A. (together with its affiliates, as applicable, "J.P. Morgan") promptly with all information necessary for NPT and J.P. Morgan to perform their respective obligations under applicable laws and regulations. You understand that NPT will implement procedures that will limit the sale of contributed securities if you are in possession of material non-public information at the time of transfer.

By signing below, you understand and agree that NPT may not accept restricted or control securities and J.P. Morgan may in its sole discretion decline to process a contribution request until J.P. Morgan and NPT have conducted due diligence surrounding the transaction and the securities have cleared legal transfer. You further agree to provide, without cost to NPT or J.P. Morgan, all documentation required by NPT and J.P. Morgan to complete due diligence, including, but not limited to, any required forms, representation letters, opinions of seller's counsel and transfer documentation, and authorize J.P. Morgan and NPT to communicate with the issuer of the restricted or control securities, its attorneys and its transfer agent in connection with your contribution. Furthermore, you acknowledge and agree that there may be time delays in connection with the due diligence process and the acceptance of the contribution, and further acknowledge and agree that the proceeds of the contribution may not be credited to the DAF until the securities have been transferred into street name and delivered, free of restrictive legend and stop transfer instruction. Neither NPT nor J.P. Morgan shall be liable for any losses, direct or indirect, that may be caused by such delays.

On behalf of myself and, if applicable, the organization for which I serve as Primary Contact, I understand that the gift of the property described in the Contribution Asset Information Section is an irrevocable and unconditional contribution when received and accepted by NPT, and that NPT retains exclusive legal control over the contributed assets. I acknowledge that I have read the J.P. Morgan Charitable Giving Fund Reference Guide (the "Reference Guide") and the terms and conditions that govern J.P. Morgan accounts (together with the Reference Guide, the "Terms and Conditions"), each as may be amended from time to time, which Terms and Conditions are incorporated by reference herein, and that I and, if applicable, the organization for which I serve as Primary Advisor, agree that the DAF is offered pursuant to the Terms and Conditions contained therein. To request a copy of the Term and Conditions, please contact your J.P. Morgan team.

I hereby certify that all information in connection with this Contribution Agreement is accurate, and I will promptly notify J.P. Morgan and NPT in writing of any changes.

**The asset owner(s) identified in Section 2 are required to sign below.**

Signature (Donor, Trustee or Primary Contact signature)

Date (mm/dd/yyyy)

Name (print)

Signature (Donor, Trustee or Primary Contact signature)

Date (mm/dd/yyyy)

Name (print)