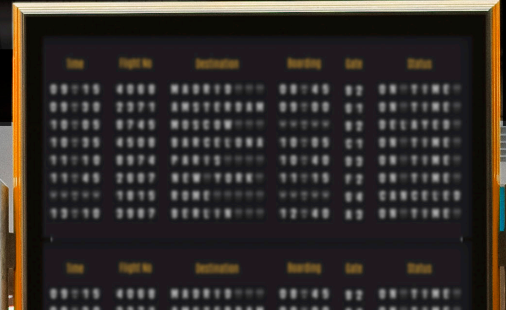


# Asset Donation Form Limited Partnership

To help your NCF team evaluate the giving potential of a specific complex asset, please answer all applicable sections (indicate N/A otherwise.)



## GIVER INFORMATION

### Giver

Title    First Name    Initial    Last Name  
\_\_\_\_\_

Email    Date of Birth  
\_\_\_\_\_

Preferred Method of Contact *(Check one)*

Email  Home Ph.  Bus. Ph.  Mail  Cell

### Notice address

Address: Including P.O. Box, street address, suite or apt #  
\_\_\_\_\_

City    State    Zip  
\_\_\_\_\_

Home Phone    Business/Cell    Fax  
\_\_\_\_\_

NCF Giving Fund Name (if none, please open at NCFgiving.com)  
\_\_\_\_\_

NCF Giving Fund Number \_\_\_\_\_

### Your advisors

In order to provide you an exceptional gifting experience, we may need to speak with your advisors on various tax matters related to your gift. When necessary, NCF's Tax Compliance Department will either contact you for further information, or you may request that we contact your advisors directly for assistance.

May we contact your professional advisor, if necessary? Yes  No

CPA Contact Information (Name, Email Address, Phone)  
\_\_\_\_\_

Legal Contact Information (Name, Email Address, Phone)  
\_\_\_\_\_

Financial Contact Information (Name, Email Address, Phone)  
\_\_\_\_\_

### Spouse, if giving jointly

Title    First Name    Initial    Last Name  
\_\_\_\_\_

Email    Date of Birth  
\_\_\_\_\_

Preferred Method of Contact *(Check one)*

Email  Home Ph.  Bus. Ph.  Mail  Cell

### Tax information

Effective Federal Tax Rate:    State Tax Rate:  
\_\_\_\_\_ %    \_\_\_\_\_ %

Giver's Estimated Adjusted Gross Income (AGI)  
\_\_\_\_\_

### NCF contact name/local office

\_\_\_\_\_

## TIMING

What is the deadline for completing the gift? \_\_\_\_\_

Please note our illustrations will show tax efficiency based on the charity receiving the gift prior to any binding agreements being executed.

Is this Company currently being marketed for sale?

Yes  No  I'm not sure

### If yes:

Do you anticipate the Company selling within 6 months?

Yes  No  I'm not sure

Have any potential buyers been identified?

Yes  No  I'm not sure

Are any of the potential buyers one of the following?

(Check all that apply)

Family member  Employee

Company Redemption

## LIMITED PARTNERSHIP

What is the Company's name? \_\_\_\_\_

How do you own your interest? In your individual name  In a trust  In a holding company

What is the legal name listed on your Company's record? \_\_\_\_\_

Is the interest certificated: Yes  No  If yes, who holds the certificate? \_\_\_\_\_

What is the nature of the Company's business activity? \_\_\_\_\_

What business phase is the Company in? Start-up  Growing  Mature

Is it a holding company or operating business? Holding Company  Operating Business  I'm not sure

### If a Holding Company:

What are the names of the underlying entities it holds? \_\_\_\_\_

\_\_\_\_\_

What percentage of the Company do you own? \_\_\_\_\_

What percentage of the Company do you want to give? \_\_\_\_% of your ownership \_\_\_\_% of total Company

What is the current estimated fair market value (FMV) of the Company? \_\_\_\_\_

How is the FMV derived? Appraisal  Estimate  Other

What is your adjusted income tax basis in your ownership of the Company?

If unknown, please list an estimate and consult your tax advisor. \_\_\_\_\_

Does your Company have any debt obligations? Yes  No  I'm not sure

**If yes:**

What is the estimated amount of the Company debt? \_\_\_\_\_

Was the debt obligation incurred more than 5 years ago? Yes  No  I'm not sure

What is the amount of total debt that is over 5 years old? \_\_\_\_\_

**INITIAL DOCUMENTS NEEDED**

Who should we contact to provide the following information?

---

Contact Information (Name, Email Address, Phone)

- Shareholder Form K-1
- Company's Tax Return (Form 1065)
- Company Financials
- Company Organization Chart (if acting as, or owned by, a holding company)

**NEXT STEPS**

Once you decide to move forward in making your complex gift, we will need the following to complete our due diligence. (NOTE: We use these documents to identify your Company's legal requirements for its owners and for any ownership transfers.)

- Certificate of Partnership Formation
- Partnership Agreement with any amendments
- List of partners with the percentage owned by each partner – including all classes of interest
- Most recent business appraisal (if available)
- Copy of front and back of ownership certificate (if applicable)
- Any other agreements that may contain transfer restrictions
- If held in a trust or holding company, please provide the applicable trust instrument or holding company's organization documents, potentially including Articles, Bylaws, Operating Agreement, Partnership Agreement or other similar document.

Would you like to use DocuSign for gift completion? Yes  No

If yes, we will be reaching out for email addresses of all required signers

**Please email these documents to your NCF contact.**