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FIDELITY Charitable®
Make more of a difference

Questions? Go to FidelityCharitable.org or call 800-952-4438.

Organizational Giving Account® Application

Type or print clearly in CAPITAL letters and black ink. If you need more room for information or signatures, use a copy of the relevant page.

Helpful to Know

- To contribute securities or mutual funds held at a firm other than Fidelity®, the attached Letter of Instruction is required.
- An organizational Giving Account® cannot be opened for nonprofit organizations or private foundations.
- Use this form to establish a Giving Account for a corporation, trust, or other business entity. A Company-established Giving Account for corporate philanthropy (a Corporate Giving Account) is subject to additional fees as described in the *Fidelity Charitable® Program Guidelines.*
- **All required fields are marked with an asterisk (*).**

1. Organizational Information

Organization Name*		Federal Tax ID Number*
Contact Name*		Phone*
Address*		
City*	State/Province*	ZIP/Postal Code*

2. Giving Account Name

Grants made to a charity are accompanied by a letter including the Giving Account name (e.g., ABC Organization Charitable Gift Fund), unless anonymity is specifically requested.

Giving Account Name*

3. Irrevocable Contribution *$25,000 Minimum Initial Donation ($100,000 for a Corporate Giving Account)*

Complete the applicable section below and check the appropriate box. *NOTE: Securities held for one year or less are deductible at the lesser of cost basis or fair market value.**

Fidelity Charitable® is not able to process irrevocable contribution requests from Fidelity® IRA accounts. Alternatively, please log in to Fidelity.com and request a one-time distribution from your IRA account to either a nonretirement Fidelity account or via EFT to your personal bank account. Once the distribution has settled, then log in to FidelityCharitable.org and process an irrevocable contribution to your Giving Account.

Cash Held at Fidelity

☐ Contribute cash held at Fidelity

Cash Transfer Amount*	Fidelity Account Number*
$	

Irrevocable Contribution continues on next page. ▶▶

Securities or Mutual Funds Held at Fidelity

☐ Contribute the following securities or mutual funds held at Fidelity. *Note: All trades are transacted in shares. If you prefer to indicate a dollar amount, we will make a current estimate (based on the previous business day's closing share price) of the number of shares needed to reach the dollar amount indicated. However, due to market conditions at the close of the market on the day the transaction is processed, the amount may be above or below the dollar amount you indicated.*

Security/Mutual Fund Name*	Symbol*	Fidelity Account Number*

Number of Shares*	Approximate Dollar Amount *Optional*
	$

Security/Mutual Fund Name*	Symbol*	Fidelity Account Number*

Number of Shares*	Approximate Dollar Amount *Optional*
	$

*Tax deductions discussed herein refer specifically to federal taxes. Rules and regulations regarding tax deductions for charitable giving vary at the state level. In addition, certain rules or limitations may apply with respect to your tax treatment depending on your specific circumstances. Please check with your tax advisor.

Cash Equivalents

Fidelity Charitable will not accept contributions of currency or certain cash-like monetary instruments, including cashier's checks, treasurer's checks, bank checks, official checks, bank drafts, traveler's checks, postal money orders, or money orders.

☐ Check

Check Amount*
$

Make checks payable to Fidelity Charitable® Gift Fund and reference the Giving Account number or name in the memo section. Mail check(s) with application.

☐ Wire

Wire Amount*	Bank Name*
$	

Wire to: JPMorgan Chase Bank, ABA: 021000021. For Credit to: NFS 066196-221. FBO: Fidelity Charitable Z97000442. Memo: CGF# _______________ . **Fidelity Charitable will not initiate this wire transfer. The wire will be rejected if necessary account numbers are not provided, which may incur a fee from your bank.**

Securities or Mutual Funds Held at a Firm Other than Fidelity

☐ Contribute securities or mutual funds held at a firm other than Fidelity. *A completed **Letter of Instruction is required.** Please refer to the attached Letter of Instruction Form for mailing instructions.*

Stock Certificates Held in Personal Possession

☐ Contribute the following stock certificates. *Note: Endorse certificate(s) by writing "National Financial Services LLC" between the words "appoint" and "attorney" in the space provided on the back of each certificate. **Date and sign** the certificate exactly as your name(s) appears on the front, and have your signature Medallion Signature Guaranteed at a financial institution that participates in the Medallion Signature Guarantee Program. Please note: A notary is not a Medallion Signature Guarantee. Mail certificates along with this application via registered mail. If an endorsement cannot be provided on the stock certificate, the Fidelity Charitable Irrevocable Stock or Bond Power form is required to be sent along with this application.*

Name of Stock*	Number of Shares*

Name of Stock*	Number of Shares*

Other Contributions

☐ Contribute restricted stock, shares held at the company/transfer agent, private placements, stock from dividend reinvestment plans (DRIPs), or real estate. *Call Fidelity Charitable at 800-952-4438 for instructions.*

By signing this form, I hereby authorize National Financial Services LLC and Fidelity Brokerage Services LLC ("Fidelity") to act on instructions directly from National Charitable Services LLC. on my behalf to transfer my contributed asset(s) indicated on this form from my nonretirement Fidelity brokerage account to Fidelity Charitable without requiring additional instructions. I fully acknowledge and understand that I am giving up all rights, claims, ownership, and entitlement to the assets once they have been transferred from any Fidelity account that I have authorized their transfer from. *Note: This is a one-time authorization.*

Form continues on next page. ▶▶

4. Investment Pool Selection

Recommend how to allocate your contribution by choosing from Option 1, 2, 3, or 4, or a combination of the four. Combined total must be 100%. Please review pool descriptions before making your recommendation. Descriptions are available at **FidelityCharitable.org** or by calling us at 800-952-4438. If you do not make a recommendation for an initial contribution, your contribution will be allocated to the Asset Allocation 20% Equity pool.

For donors seeking instant diversification to multiple asset classes in a single investment. These pools have a mix of stocks, bonds, and short-term instruments that range from a higher equity allocation mix to a lower equity allocation mix.

Our Pool Selector at FidelityCharitable.org may help you select an Asset Allocation Pool based on your giving goals and investment risk tolerance for your Giving Account.

Option 1: Asset Allocation Pools	**Percentage of total**
☐ Asset Allocation 85% Equity	%
☐ Asset Allocation 70% Equity	%
☐ Asset Allocation 60% Equity	%
☐ Asset Allocation 50% Equity	%
☐ Asset Allocation 40% Equity	%
☐ Asset Allocation 30% Equity	%
☐ Asset Allocation 20% Equity	%

For donors who want to build a custom strategy combining pools with specific investment objectives for Giving Account balances.

Option 2: Single Asset Class Pools	**Percentage of total**
Domestic Stock	
☐ U.S. Equity	%
☐ U.S. Equity Access	%
☐ Total Market Index	%
Foreign Stock	
☐ International Equity	%
☐ International Equity Access	%
☐ International Index	%
Bond	
☐ Fixed Income	%
☐ Fixed Income Access	%
☐ U.S. Bond Index	%
☐ Short-Term Fixed Income Access	%
☐ Inflation Protected Bond Index	%
Money Market	
☐ Money Market	%

For donors who seek strategies that consider social and environmental factors, while emphasizing financial returns.

Option 3: Sustainable and Impact Investing Pools	**Percentage of total**
Stock	
☐ Sustainable U.S. Index	%
☐ Sustainable U.S. Index Access	%
☐ Sustainable International Index	%
☐ Environmental Impact Access	%
Bond	
☐ Sustainable U.S. Bond Index	%

For donors seeking an "all-weather" asset allocation pool with exposure to both traditional and non-traditional asset classes.

Option 4: Charitable Legacy Pool	**Percentage of total**
☐ Charitable Legacy	%
COMBINED TOTAL MUST EQUAL:	1 0 0 %

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5. Giving Account Authorization and Access

Part I — Certification

This certification must be signed by an Officer other than those individuals named in Part II, unless you have checked below that you are the Sole Officer of the Organization.

☐ Sole Officer

Name of Officer*	Title*

State in Which Organization Exists*

By signing below, you:

- Certify that the Organization identified in this application is duly organized and existing under the laws of the state indicated above, and has the power to take the action called for by the resolutions and authorization included in Part II of this application; and
- Certify that the resolutions and authorization included in this application are true and correct and that no action has been taken to rescind or amend said resolutions, and that the same are now in full force and effect.

SIGN	Officer Signature*	Date* *MM DD YYYY*

Part II — Authorized Giving Account Contacts

Be it resolved that the individual(s) named in this application or any one of them acting individually be, and they hereby are, authorized to transact business with Fidelity Charitable in the name of this Organization; further, that they are authorized to make contributions, communicate organizational grant recommendations, and request account statements and reports for and on behalf of said Organization; and further, that any Officer of this Organization is hereby authorized to certify this resolution to Fidelity Charitable. *Note: If there is more than one individual authorized to conduct business on behalf of the Organization, Fidelity Charitable will send all Giving Account correspondence to the individual identified by the Organization as the Primary Giving Account Contact.*

Primary Giving Account Contact

First Name*	M.I.	Last Name*

Date of Birth* *MM DD YYYY*	Social Security or Taxpayer ID Number*	Title*

Organization Name*	Department

Business Address*

City*	State/Province*	ZIP/Postal Code*	Country

Business Phone*	Extension

Business Fax Number	Business Email Address*

Giving Account Authorization and Access continues on next page. ▶▶

Additional Authorized Giving Account Contact #1 *Attach additional sheets, if necessary.*

First Name*	M.I.	Last Name*

Date of Birth* *MM DD YYYY*	Social Security or Taxpayer ID Number*	Title*

Organization Name*	Department

Business Address*

City*	State/Province*	ZIP/Postal Code*	Country

Business Phone*	Extension

Business Fax	Business Email Address*

Additional Authorized Giving Account Contact #2 *Attach additional sheets, if necessary.*

First Name*	M.I.	Last Name*

Date of Birth* *MM DD YYYY*	Social Security or Taxpayer ID Number*	Title*

Organization Name*	Department

Business Address*

City*	State/Province*	ZIP/Postal Code*	Country

Business Phone*	Extension

Business Fax	Business Email Address*

Form continues on next page. ▶▶

6. Referral

Existing Fidelity Client Relationship

Is this Giving Account being established as a result of an existing Fidelity client relationship?

Check one.

☐ Yes *If yes, list the Fidelity company(ies) with which your company has a relationship.*

Fidelity Company(ies)

☐ No

Advisor/Accounting Firm Relationship

Is this Giving Account being established on the recommendation of a tax advisor or an accounting firm?

Check one.

☐ Yes *If yes, complete the section below.*

☐ No

Advisor Name			Firm Name
Phone Number	Email Address		
Address			
City	State/Province	ZIP/Postal Code	Country

Form continues on next page. ▶▶

7. Required Signature(s) *Attach any additional authorized Giving Account contact signatures.*

By signing below, you:

- Acknowledge that you have read the current *Fidelity Charitable Program Guidelines* and agree to its terms and/or conditions described therein.
- Understand that any contribution, once accepted by the Trustees, represents an irrevocable contribution to Fidelity Charitable and is not refundable to the Donor.
- Certify that to the best of your knowledge, all information presented in connection with this form is accurate.
- Will promptly notify Fidelity Charitable in writing of any changes.
- Each organizational Giving Account is assessed an annual administrative fee of 0.60% of Giving Account assets or $500, whichever is greater; any Corporate Giving Account would also be assessed an additional annual administrative fee $10,000. Additional fees may apply for additional programs, services, or investment options.

Primary Authorized Giving Account Contact Name*	
Primary Authorized Giving Account Contact Signature*	Date* *MM DD YYYY*
SIGN	

Additional Authorized Giving Account Contact Name*	
Additional Authorized Giving Account Contact Signature*	Date* *MM DD YYYY*
SIGN	

Additional Authorized Giving Account Contact Name*	
Additional Authorized Giving Account Contact Signature*	Date* *MM DD YYYY*
SIGN	

Important Information about Procedures for Establishing a Giving Account
Under policies of Fidelity Charitable, and in accordance with the anti–money laundering regulations applicable to the various financial institutions that provide financial services to Fidelity Charitable, we obtain, record, and may verify information that identifies each entity or person who establishes a Giving Account at Fidelity Charitable, and other people who contribute or have access to the Giving Account.

What this means for you and your organization: When Fidelity Charitable establishes a Giving Account, we will ask for the name, address, date of birth, and other information that will allow us to identify people with access to the Giving Account. We may also ask to see individual driver's licenses or other identifying documents, and we may verify the information we obtain.

Did you sign the form and attach any necessary documents?
Send the form and any attachments to Fidelity Charitable.

Questions? Go to FidelityCharitable.org or call 800-952-4438.

Regular mail
Fidelity Charitable
PO Box 770001
Cincinnati, OH 45277-0001

OR

Fax the form to: 877-665-4274

Overnight mail
Fidelity Charitable
100 Crosby Parkway
Mail zone KC1D-FCS
Covington, KY 41015-4325

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Letter of Instruction Information

Use this Letter of Instruction ONLY if you are transferring securities or mutual funds held at a firm other than Fidelity. If you are transferring cash, refer to the instructions on the Contribution Form or the Donor Application.

Helpful to Know

- Complete the attached Letter of Instruction. All parties who are registered on the delivering firm's account(s) must sign the letter.
- Submit documentation according to the following instructions:

FOR MUTUAL FUNDS HELD AT A FIRM OTHER THAN FIDELITY

Mail to Fidelity Charitable®:

- Original Letter of Instruction.
- Copy of a recent statement from the transferring mutual fund company.
- Donor Application or Contribution Form.

Do not send anything to the transferring mutual fund company.

FOR STOCKS HELD AT A FIRM OTHER THAN FIDELITY

Mail to Fidelity Charitable®:

- Original Letter of Instruction.
- Copy of a recent statement from the delivering broker.
- Donor Application or Contribution Form.

Do not send anything to the delivering broker.

FOR DIVIDEND REINVESTMENT PLANS *DRIPs*

Call Fidelity Charitable at 800-952-4438 for instructions.

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Letter of Instruction

Type or print clearly in CAPITAL letters and black ink. If you need more room for information or signatures, use a copy of the relevant page.
All required fields are marked with an asterisk (*).

1. Donor Instructions

Complete and deliver this Letter of Instruction as follows:

Mutual funds (two to four weeks to complete transfer from receipt of instructions): Mail original letter along with mutual fund statement and completed Contribution Form or Donor Application to Fidelity Charitable®.

Securities: Mail original letter along with a current statement from the delivering broker and a completed Contribution Form or Donor Application to Fidelity Charitable®. If shares are part of a dividend reinvestment plan (DRIP), please call Fidelity Charitable at 800-952-4438 for instructions.

Delivering Broker's Firm*	Broker Name*

Date* *MM DD YYYY*	Daytime Phone*	Extension

Address*

City*	State*	ZIP*

Transfer instructions

FROM:

Outside Firm Account Number*

TO:

Note to Broker-Dealers: *This account number is not the valid delivery brokerage account. See the Broker-Dealer Instructions section on the next page.*

Fidelity Charitable® Giving Account® Number*

Number of Shares*	Approx. Dollar Amt. *if known*		Security/Mutual Fund Name*
	$	**OF**	
	$	**OF**	
	$	**OF**	

Form continues on next page. ▶▶

2. Signatures and Dates

Please accept this Letter of Instruction as my authorization to irrevocably transfer the above positions from my account with your firm to Fidelity® Charitable Gift Fund.

Owner Name*

DATE Date* *MM DD YYYY*

SIGN Owner Signature*

AUTHORIZED FOR FIDELITY USE ONLY
MEDALLION SIGNATURE GUARANTEE

Owner/Authorized Individual Name*

DATE Date* *MM DD YYYY*

SIGN Owner/Authorized Individual Signature*

AUTHORIZED FOR FIDELITY USE ONLY
MEDALLION SIGNATURE GUARANTEE

3. Broker-Dealer Instructions

Deliver all eligible securities according to these instructions. **Shares should be transferred in kind and are not to be liquidated.**

Deliver to: DTC 0226 Acct Z97000442

FBO: ACCT#_______

Any physical deliveries (i.e., certificates) should be sent via registered mail to:
Fidelity Charitable, 100 Crosby Parkway, Mail Zone KC1D-FCS, Covington, KY 41015-9325

Mutual Fund Transfers Only
If NFS cannot accommodate the transfer of the positions above, this document will be accompanied by a Letter of Instruction to transfer the above shares to an account at your firm in the name of Fidelity Charitable. In such circumstances, please accept this letter as instruction and authorization to transfer the shares to the Fidelity Charitable account at your firm.

Transfer Agents
For DRS-eligible securities, do not open a DRS account. The transfer will be initiated by the receiving firm.

Did you sign the form and attach any necessary documents?
Send the form and any attachments to Fidelity Charitable.

Questions? Go to FidelityCharitable.org or call 800-952-4438.

If the delivering broker requires an original signature, you must mail the form to Fidelity Charitable. We cannot accept an original signature via fax.

Regular mail
Fidelity Charitable
PO Box 770001
Cincinnati, OH 45277-0001

OR

Fax the form to: 877-665-4274

Overnight mail
Fidelity Charitable
100 Crosby Parkway
Mail zone KC1D-FCS
Covington, KY 41015-4325