

## **Endowed Giving Program Enrollment Form**

Use this form to enroll in the Endowed Giving Program, which allows Giving Account® Holders to support charitable organizations beyond their lifetime by enabling ongoing grants to up to six (6) charitable beneficiaries. A \$100,000 minimum Giving Account® balance is required at Activation, which occurs at the death of the last remaining Account Holder. Refer to the Fidelity Charitable®: Program Guidelines for additional information.

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

Note: At the time of Activation of the Endowed Giving Program, investments in the Charitable Investment Advisor Program ("CIAP") and/or the Charitable DonorFlex Program<sup>SM</sup> ("DonorFlex") will be liquidated in a prudent manner and the proceeds invested in Fidelity Charitable® investment pools. If no recommended investment pool allocation has been made by the Account Holder, the proceeds will

	Allocation 20% Equity Pool at the time of Activation. Please refer to the Fidelity Charitable: Program Guidelines				
Check one, if applicable.					
proportionately alloca	CIAP and/or DonorFlex and, once enrolled in the Endowed Giving Program, I recommend these balances be sted to the investment pools recommended on the <i>Endowed Giving Program Investment Pool Selection Form</i> , on. I understand that all investment pool recommendations and allocations are subject to ongoing review and Charitable.				
firm continue to mana	CIAP and, once enrolled in the Endowed Giving Program, I recommend having my CIAP-qualified investment ge the assets in the Endowed Giving Program, at the time of Activation. I understand that all investment firms are subject to ongoing review and approval by Fidelity Charitable.				
1. Giving Acco	ount Number				
Check one.	I am establishing a new Giving Account.				
	I currently have a Giving Account.				
	Giving Account Number				
2. Rename the Giving Account					
	omplete this section to change the Giving Account name upon Activation of the Endowed Giving Program. pically, Account Holders choose a name in honor of themselves (e.g., "The Smith Family Memorial Fund").				
Gi	iving Account Name				
3. Endowed Giving Program Duration and Annual Distribution Percentage					

If no duration (term length) is stated, ongoing grants to charitable beneficiaries will continue in perpetuity. The term length will apply to ALL elected beneficiaries.

Term Length Minimum 5 years

Total annual percentage (minimum 5%) of Giving Account balance to be distributed to recommended Endowed Giving Program Beneficiaries:



Form continues on next page.



<sup>\*</sup>The Endowed Giving Program requires a minimum total annual distribution amount of 5% of the Giving Account balance or applicable IRS minimum percentage. If amounts distributed in a given year do not meet this minimum, Fidelity Charitable® will calculate and distribute the difference to the charitable grant recipients in the same proportion as recommended. Distribution calculations are based on the Giving Account balance as of December 31 of the prior calendar year.

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## 4. Endowed Giving Program Beneficiary Recommendations

**Endowed Giving Program Beneficiary #1** % Limit of six (6) charitable beneficiaries. Please Organization Name Federal Tax ID Number if known use an additional sheet of paper if needed. Phone **Mailing Address** Address State/Province ZIP/Postal Code Frequency of recurring grant: Check one. ☐ Semiannual ☐ Annual Anonymous grant: Check one. Yes % of Total Annual Distribution to Charity from Giving Account **Endowed Giving Program Beneficiary #2** This is my Alternate Beneficiary: % Check one. Yes ☐ No Organization Name Federal Tax ID Number if known Phone **Mailing Address** Address ZIP/Postal Code State/Province Country Frequency of recurring grant: Check one. ☐ Semiannual ☐ Annual Anonymous grant: Check one. Yes ☐ No

% of Total Annual Distribution to Charity from Giving Account

If you are recommending only one Endowed Giving Program Beneficiary, you have the opportunity to also recommend an Alternate Beneficiary, in the case that your recommended beneficiary becomes ineligible. If you do not recommend an Alternate Beneficiary, or if the alternate becomes ineligible, the remaining Giving Account balance will be granted out in accordance with the Fidelity Charitable Trustees' Initiative.

Endowed Giving Program Beneficiary Recommendations continues on next page.

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Endowed Giving Progr	alli Dellellciai v π3	% of lot	% of Total Annual Distribution to Charity from Giving Account		
Organization Name	,			%	
Organization Name			IS 1. 1.		
			Federal lax	ID Number if known	
Phone					
Mailing Address					
Address					
City	State/Province ZIP	/Postal Code	Country		
Frequency of recurring grant:			1		
Semiannual					
☐ Annual					
Anonymous grant:					
Yes					
□ No					
Organization Name			Federal Tax	ID Number if known	
rnone	1 1 1				
Mailing Address					
Address					
City	State/Province ZIP	/Postal Code	Country		
Frequency of recurring grant:					
Frequency of recurring grant:					
_ ' ' '					
Semiannual					
Semiannual Annual					
Semiannual Annual Anonymous grant:					
	City  Frequency of recurring grant:  Semiannual  Annual  Anonymous grant:  Yes  No  Endowed Giving Progr  Organization Name  Phone  Mailing Address  Address	Address  City State/Province ZIP  Frequency of recurring grant:  Semiannual Annual Anonymous grant:  Yes No  Endowed Giving Program Beneficiary #4  Organization Name  Phone  Mailing Address  Address	Address  City State/Province ZIP/Postal Code  Frequency of recurring grant:  Semiannual  Annual  Annonymous grant:  Yes  No  Endowed Giving Program Beneficiary #4   Organization Name  Phone  Mailing Address  Address	Address  City State/Province ZIP/Postal Code Country  Frequency of recurring grant:  Semiannual  Annual  Anonymous grant:  Yes  No  Endowed Giving Program Beneficiary #4   Organization Name  Federal Tax  Phone  Mailing Address  Address	

IMPO Progra Giving Program recommendations, equals 100%. Please refer to the Fidelity Charitable: Program Guidelines for additional information.

Form continues on next page.

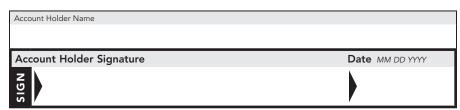
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## 5. Signature and Date

By signing below, you:

- Acknowledge that you have read Fidelity Charitable: Program Guidelines and agree to the terms and/or conditions described therein.
- Certify that grant recommendations made herein adhere to these guidelines and neither you nor anyone else will receive any more than incidental benefits from the recommended charitable organizations from these grants if distributed, and that these grants do not fulfill pre-existing legally enforceable pledges to the recommended charitable organizations.
- Understand that by establishing the Endowed Giving Program, the Trustees do not intend to confer or constitute a contractual, trust, or other fiduciary relationship with participating Account Holders, grant recipients or any other person, and that the Trustees may modify, amend, or eliminate the Endowed Giving Program at any time.
- Understand that under the terms of the Endowed Giving Program, Fidelity Charitable® is specifically authorized to expend as much income and principal as the Trustees deem appropriate. See Fidelity Charitable: Program Guidelines for complete details.



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

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

Fax form to: 877-665-4274 If faxing this form, please <u>do not</u> also mail original.

Mail the form to:

Regular mail Fidelity Charitable PO Box 770001 Cincinnati, OH 45277-0053 Overnight mail Fidelity Charitable 100 Crosby Parkway KC1D-FC Covington, KY 41015-9325

Fidelity Charitable is the brand name for the Fidelity Investments® Charitable Gift Fund, an independent public charity with a donor-advised fund program. Various Fidelity companies provide services to Fidelity Charitable. Fidelity Charitable and Fidelity are registered service marks, and the Fidelity Charitable logo is a service mark, of FMR LLC, used by Fidelity Charitable under license. Giving Account is a registered service mark, and the Charitable DonorFlex Program is a service mark, of the Trustees of Fidelity Charitable. 485201.9.0

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