

Broker-Dealer Instructions

Deliver all eligible securities per these instructions.

Shares should be transferred in kind and are not to be liquidated.

A Contribution Form must accompany all contributed securities. You must recommend an investment allocation on the Contribution Form. Per our policy, if you do not make an investment recommendation, your contribution will be allocated to the Conservative Income Pool or proportionally to reflect the current allocation of the Giving Account®.

For credit to: National Financial Services LLC
For benefit of: Fidelity Charitable® Giving Account® [number]
DTC: 0226
Account Number: Z97-000442

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, please 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 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 45277-0053

Overnight mail

Fidelity Charitable
100 Crosby Parkway KC1D-FCS
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. The Fidelity Charitable name and logo, and Fidelity are registered service marks of FMR LLC, used by Fidelity Charitable under license. Giving Account is a registered service mark of the Trustees of Fidelity Charitable. 707718.5.0 (04/2023)