



# Contribution Form

If you prefer to make your contribution online, visit [FidelityCharitable.org](http://FidelityCharitable.org).

- To contribute securities or mutual funds held at a firm other than Fidelity,® the attached Letter of Instruction is required.
- To contribute cash, securities or mutual funds held in a non-retirement Fidelity brokerage account, please read Section 4 and disregard the attached Letter of Instruction.
- Please type or print clearly in all **CAPITAL LETTERS** using black ink.

## 1 GIVING ACCOUNT® INFORMATION

Primary Account Holder Name

Giving Account Number

Daytime Telephone Number

Giving Account Name

Who is making this contribution to Fidelity Charitable<sup>SM</sup>? Please check one:

**Primary Account Holder**       **Additional Account Holder:** Name:

**Third-Party Contributor:** If the person making the contribution is not a named Account Holder, he or she is considered a third-party contributor. Please have him or her complete and sign this section.

I, the third-party contributor, understand that any contribution, once accepted by the Trustees, represents an irrevocable contribution to Fidelity Charitable and is not refundable to me. I further understand, while I may be eligible to take a tax deduction for my contribution, I do not obtain any Giving Account advisory privileges. I also confirm that I did not receive anything in exchange for, or in consideration of, this contribution.

Name of Third-Party Contributor

Social Security or Tax ID Number (TIN)

 U.S. Citizen

 U.S. Resident Alien

Legal Address (P.O. boxes not accepted)

City

State

ZIP Code/Postal Code

If contributing from a Fidelity Account, I hereby authorize National Financial Services LLC and Fidelity Brokerage Services LLC (hereinafter collectively referred to as "Fidelity") to act on instructions directly from National Charitable Services Corp. on my behalf to transfer my contributed assets indicated on this form from my Fidelity Account to Fidelity Charitable. I fully acknowledge and understand that I am giving up all rights, claims, ownership and entitlement to the cash equivalents, securities or mutual funds once they have been transferred from my Fidelity Account. Note: This is a one-time authorization.

Please Print Third-Party Contributor Name Below

Signature of Third-Party Contributor

Date

## 2 IRREVOCABLE CONTRIBUTION (\$5,000 INITIAL DONATION)

Please complete the applicable section on the next page and check the appropriate box. If your employer matches charitable contributions to charities with donor-advised fund programs, please include the appropriate company paperwork.

NOTE: Securities held for one year or less are generally deductible at the lesser of cost basis or fair market value.\*

\*Information provided is general and educational in nature. It is not intended to be, and should not be construed as, legal or tax advice. Fidelity Charitable does not provide legal or tax advice. Content provided relates to taxation at the federal level only. Availability of certain federal income tax deductions may depend on whether you itemize deductions. Rules and regulations regarding tax deductions for charitable giving vary at the state level, and laws of a specific state or laws relevant to a particular situation may affect the applicability, accuracy, or completeness of the information provided. Charitable contributions of capital gain property held for more than one year are usually deductible at fair market value. Deductions for capital gain property held for one year or less are usually limited to cost basis. Consult an attorney or tax advisor regarding your specific legal or tax situation.

**A. Contribute Cash, Securities or Mutual Funds Held at Fidelity:**

**Cash Held at Fidelity:** \$    ,    ,

Fidelity Account Number  
   -

**Please 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.

**Securities or Mutual Funds Held at Fidelity:**

Name of Mutual Fund/Security (And Symbol, if known)  
**1.**

Fidelity Account Number  
   -

Number of Shares

Approximate Dollar Amount (Optional)  
 \$    ,    ,

Name of Mutual Fund/Security (And Symbol, if known)  
**2.**

Fidelity Account Number  
   -

Number of Shares

Approximate Dollar Amount (Optional)  
 \$    ,    ,

**B. Contribute Cash Equivalents:**

**Please Note:** 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:** \$    ,    ,

Make checks payable to Fidelity Charitable Gift Fund and reference the Giving Account number or name in the memo section.

**Wire:** \$    ,    ,

Bank Name

**Wire to:** JPMorgan Chase Bank, New York, NY, ABA Number: 021000021 For credit to: National Financial Services LLC, Account: 066196-221 For benefit of: Fidelity® Charitable Gift Fund, Z97-000442. For further credit to: Name and Giving Account Number (if known). **Fidelity Charitable will not initiate this wire transfer.**

**C. 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.

**D. Contribute Stock Certificates Held in Personal Possession:**

Name of Stock  
**1.**

Number of Shares

Name of Stock  
**2.**

Number of Shares

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 Fidelity Investor Center or other 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.

**E. 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.

### 3 INVESTMENT POOL SELECTION

Recommend how to allocate your contribution by choosing from Option 1, 2 or 3 or a combination of the three. Combined total must be 100%. If you do not make a recommendation for an initial contribution, your contribution will be allocated to the Money Market Pool. If you do not make a recommendation for an additional contribution, the proceeds from your contribution will be allocated proportionally to reflect the pool allocation of your Giving Account's current balance. Please review pool descriptions before making your recommendation. Descriptions are available at [FidelityCharitable.org](http://FidelityCharitable.org) or by calling us at 800-952-4438.

#### Option 1: Asset Allocation Pools

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](http://FidelityCharitable.org) will help you select an Asset Allocation Pool based on your giving goals and investment risk tolerance for your Giving Account.

- Aggressive Growth (85% Equity) % of total: \_\_\_\_\_
- Growth (70% Equity) % of total: \_\_\_\_\_
- Moderate Growth (60% Equity) % of total: \_\_\_\_\_
- Balanced (50% Equity) % of total: \_\_\_\_\_
- Moderate Income (40% Equity) % of total: \_\_\_\_\_
- Income (30% Equity) % of total: \_\_\_\_\_
- Conservative Income (20% Equity) % of total: \_\_\_\_\_

#### Option 2: Single Asset Class Pools

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

##### Domestic Stock

- U.S. Equity % of total: \_\_\_\_\_
- Total Market Index % of total: \_\_\_\_\_

##### Foreign Stock

- International Equity % of total: \_\_\_\_\_
- International Index % of total: \_\_\_\_\_

##### Bond

- Fixed Income % of total: \_\_\_\_\_
- U.S. Bond Index % of total: \_\_\_\_\_

##### Money Market

- Money Market % of total: \_\_\_\_\_

#### Option 3: Charitable Legacy Pool

For donors with Giving Account balances of \$100,000 or more who are looking to implement a charitable giving strategy with a long-term approach similar to that of an endowment.

- Charitable Legacy % of total: \_\_\_\_\_

COMBINED TOTAL MUST EQUAL:

1 0 0 %

### 4 FIDELITY BROKERAGE CUSTOMERS ONLY

By signing Section 5, You (an account owner of a Fidelity brokerage account) are 1) authorizing National Charitable Services Corp. ("NCS") to accept instructions from You and/or your authorized Interested Party/Agent/Advisor ("Your Agent") to transfer cash and securities from a Fidelity non-retirement brokerage account to Fidelity Charitable, as a charitable contribution, without requiring additional written instructions from You; and 2) authorizing Fidelity Brokerage Services LLC and National Financial Services LLC to act on such instructions directly from NCS without additional authorizations from You. This authorization shall apply only to non-retirement Fidelity brokerage accounts on which You are registered as an owner ("Fidelity Account"), and in the case of Your Agent, for which Your Agent has been authorized with full trading authority or asset movement authorization level 1 or 2. This authorization will only be relied upon when You or Your Agent provides contribution instructions to Fidelity Charitable. This authorization is subject to the terms and conditions described below. Please read these terms and conditions carefully and retain them for your records.

#### Terms and Conditions

By granting this authorization, You understand and agree that Fidelity Brokerage Services LLC, National Financial Services LLC, and National Charitable Services Corp. (collectively hereinafter "Fidelity"), and Fidelity Charitable will not undertake to confirm Your Agent's representations or instructions or to monitor Your Agent's compliance with your instructions to him or her and will rely solely upon the instructions of Your Agent for these transfers. You understand that You should carefully review your account documentation and monitor all activity in your Fidelity Account and your Giving Account® at Fidelity Charitable. Fidelity or NCS may require direct instructions from You on transactions over a certain dollar amount. Upon requests for any account-related activity in your Fidelity Account or your Giving Account® at Fidelity Charitable from Your Agent, Fidelity and/or Fidelity Charitable reserves the right, but is not obligated, to confirm with You any of your or Your Agent's instructions prior to acting on them and to restrict or not accept requests for these transfers, at its/their own discretion. Your Agent is authorized to act for You and on your behalf in the same manner and with the same force and effect as you might or could do to the extent necessary or incidental to the furtherance or conduct of the Fidelity Account in accordance with this authorization or your separate standing instructions. Your Agent will not conduct activity in your Fidelity Account that exceeds its authority under this authorization or any other agreement governing your Fidelity Account(s). This authorization shall be applicable to all assets you hold in your Fidelity Account(s). No Fidelity entities are affiliated with Your Agent (excluding however, Strategic Advisers, Inc.) and have no relationship except as described in this authorization. Neither Fidelity nor Fidelity Charitable will have any duty to inquire into the authority of Your Agent to engage in particular transactions or to monitor the terms of any oral or written agreement between You and Your Agent. Your Agent is obligated to comply with, and make all disclosures as required by, all applicable state, Federal and industry

**4 FIDELITY BROKERAGE CUSTOMERS ONLY (continued)**

securities laws and regulations, and interpretations promulgated there under, including but not limited to the Investment Advisers Act of 1940, the Securities Exchange Act of 1934, the Investment Company Act of 1940 and the NASD Rules and/or FINRA rules. Neither Fidelity nor Fidelity Charitable will undertake to confirm or ensure that Your Agent remains in compliance with its obligations. You agree to indemnify and hold harmless Fidelity Brokerage Services LLC, National Financial Services LLC, National Charitable Services Corp., and Fidelity Charitable, and any of its affiliates and their respective officers, directors, employees and agents from and against any and all losses, claims or financial obligations (including reasonable attorneys' fees) that may arise from any act or omission of Your Agent with respect to your Fidelity Account or Giving Account® at Fidelity Charitable. This authorization is a continuing one and shall remain in full force and effect until either Fidelity or Fidelity Charitable is notified in writing of your death, disability or incapacity or unless revoked through written notice actually received by either Fidelity or Fidelity Charitable. Such revocation, however, shall not affect any prior liability in any way resulting from any transaction initiated before receipt of the revocation. Furthermore, it is understood that this authorization and indemnity is in addition to, and in no way restricts, any rights that may exist at law or under any other agreement(s) between You and Fidelity Brokerage Services LLC, National Financial Services LLC, National Charitable Services Corp., or Fidelity Charitable. This authorization and indemnity shall be construed, administered and enforced according to the laws of the Commonwealth of Massachusetts. It shall inure to the benefit of Fidelity and Fidelity Charitable, and of any successor organization(s) (whether by merger, consolidation or otherwise) irrespective of any change(s) at any time in the personnel thereto for any cause whatsoever and to the benefit of the affiliates and the assigns of Fidelity or Fidelity Charitable or any successor organization. It is further understood that Fidelity and/or Fidelity Charitable reserves the right to cease accepting instructions from You or Your Agent at its sole discretion and for its sole protection.

**5 REQUIRED SIGNATURE**

I acknowledge that I have read the current *Fidelity Charitable Policy Guidelines: Program Circular* and agree to the terms and conditions described therein. I understand that any contribution, once accepted by the Trustees, represents an irrevocable contribution to Fidelity Charitable and is not refundable to me. I further understand that, if the contribution is being made by a third party, only the third party may be eligible for a tax deduction. I hereby certify that, to the best of my knowledge, all information presented in connection with this form is accurate and I will notify Fidelity Charitable promptly in writing of any changes.

Please Print Account Holder or Fully Authorized Interested Party Name Below

Signature

Date

Regular mail address  
**Fidelity Charitable**  
**P.O. Box 770001**  
**Cincinnati, OH 45277-0053**

Overnight delivery address  
**Fidelity Charitable**  
**100 Crosby Parkway**  
**Mail zone KC1D-FCS**  
**Covington, KY 41015-9325**

Or FAX to:  
**877-665-4274**

Fidelity Charitable<sup>SM</sup> is the brand name for the Fidelity® 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 are service marks, and Fidelity is a registered service mark, of FMR LLC, used by Fidelity Charitable under license. Giving Account is a registered service mark of the Trustees of Fidelity Charitable.



# Letter of Instruction

When completing this form, please type or print clearly in all CAPITAL LETTERS using black ink.

Regular mail address:

Fidelity Charitable<sup>SM</sup>  
P.O. Box 770001  
Cincinnati, OH 45277-0053

Overnight delivery address:

Fidelity Charitable<sup>SM</sup>  
100 Crosby Parkway  
Mail zone KC1D-FCS  
Covington, KY 41015-9325

Phone: 800-952-4438 for assistance with any matter

Fax: 877-665-4274

Web: [FidelityCharitable.org](http://FidelityCharitable.org) for Giving Account establishment and additional forms

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

1. Please complete the Letter of Instruction (which appears on the reverse side). All parties who are registered on the delivering firm's account(s) must sign the letter.
2. 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; must be Medallion Signature Guaranteed.  
A Medallion Signature Guarantee can be obtained at any Fidelity Investor Center or other financial institution that participates in the Medallion Signature Guarantee Program. Please note, a notary is not a Medallion Signature Guarantee.
- 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 the firm currently holding the securities:

- Original Letter of Instruction  
The firm holding the securities may require a Medallion Signature Guarantee, which can be obtained at any Fidelity Investor Center or other financial institution that participates in the Medallion Signature Guarantee Program. Please note, a notary is not a Medallion Signature Guarantee.

**AND**

### Mail or fax to Fidelity Charitable:

- Copy of the Letter of Instruction
- Donor Application or Contribution Form

## FOR DIVIDEND REINVESTMENT PLANS (DRIPs)

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

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**DONOR INSTRUCTIONS**

**Complete and deliver this Letter of Instruction as follows:**

Mutual Funds (2-4 weeks to complete transfer from receipt of instructions): Mail original Medallion Signature Guaranteed letter along with mutual fund statement and completed Contribution Form or Donor Application to Fidelity Charitable.

Securities: Mail original letter to delivering broker and mail or fax a copy along with a completed Contribution Form or Donor Application to Fidelity Charitable. If shares are part of a DRIP, please call Fidelity Charitable at 800-952-4438 for instructions.

Delivering Broker's Firm

Date

Daytime Phone

Mailing Address

City

State

ZIP Code/Postal Code

Dear \_\_\_\_\_ :

Broker's Name

**Please accept this letter as my authorization to irrevocably transfer the following positions from my account with your firm to Fidelity Charitable Gift Fund.**

**FROM:** \_\_\_\_\_ **TO:** \_\_\_\_\_

Outside Firm Account Number

Fidelity Charitable Giving Account® Number (if known)

**Note to Brokers/Dealers**—this account number is not the valid delivery brokerage account. See the Broker/Dealer Instructions section below.

1. \_\_\_\_\_ **SHARES (\$** \_\_\_\_\_ **) OF** \_\_\_\_\_  
 Number Approx. Dollar Amt. (if known) Mutual Fund Name or Security
2. \_\_\_\_\_ **SHARES (\$** \_\_\_\_\_ **) OF** \_\_\_\_\_  
 Number Approx. Dollar Amt. (if known) Mutual Fund Name or Security
3. \_\_\_\_\_ **SHARES (\$** \_\_\_\_\_ **) OF** \_\_\_\_\_  
 Number Approx. Dollar Amt. (if known) Mutual Fund Name or Security

**Sincerely,**

Signature

Name (Please Print)

\_\_\_\_\_

Signature

Name (Please Print)

\_\_\_\_\_

<b>REQUIRED</b>	
PLACE MEDALLION SIGNATURE GUARANTEE PROGRAM STAMP HERE	
Signature Guarantee	Date

**BROKER/DEALER INSTRUCTIONS**

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

For credit to: National Financial Services LLC  
DTC: 226  
Account Number: Z97-000442

For benefit of: Fidelity Charitable Gift Fund  
For further credit to: [donor name and Fidelity Charitable Giving Account number, if known.]

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  
559237.2.0

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Regular mail address

**Fidelity Charitable**  
**P.O. Box 770001**  
**Cincinnati, OH 45277-0053**

Overnight delivery address

**Fidelity Charitable**  
**100 Crosby Parkway**  
**Mail zone KC1D-FCS**  
**Covington, KY 41015-9325**

Or FAX to:  
**877-665-4274**

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