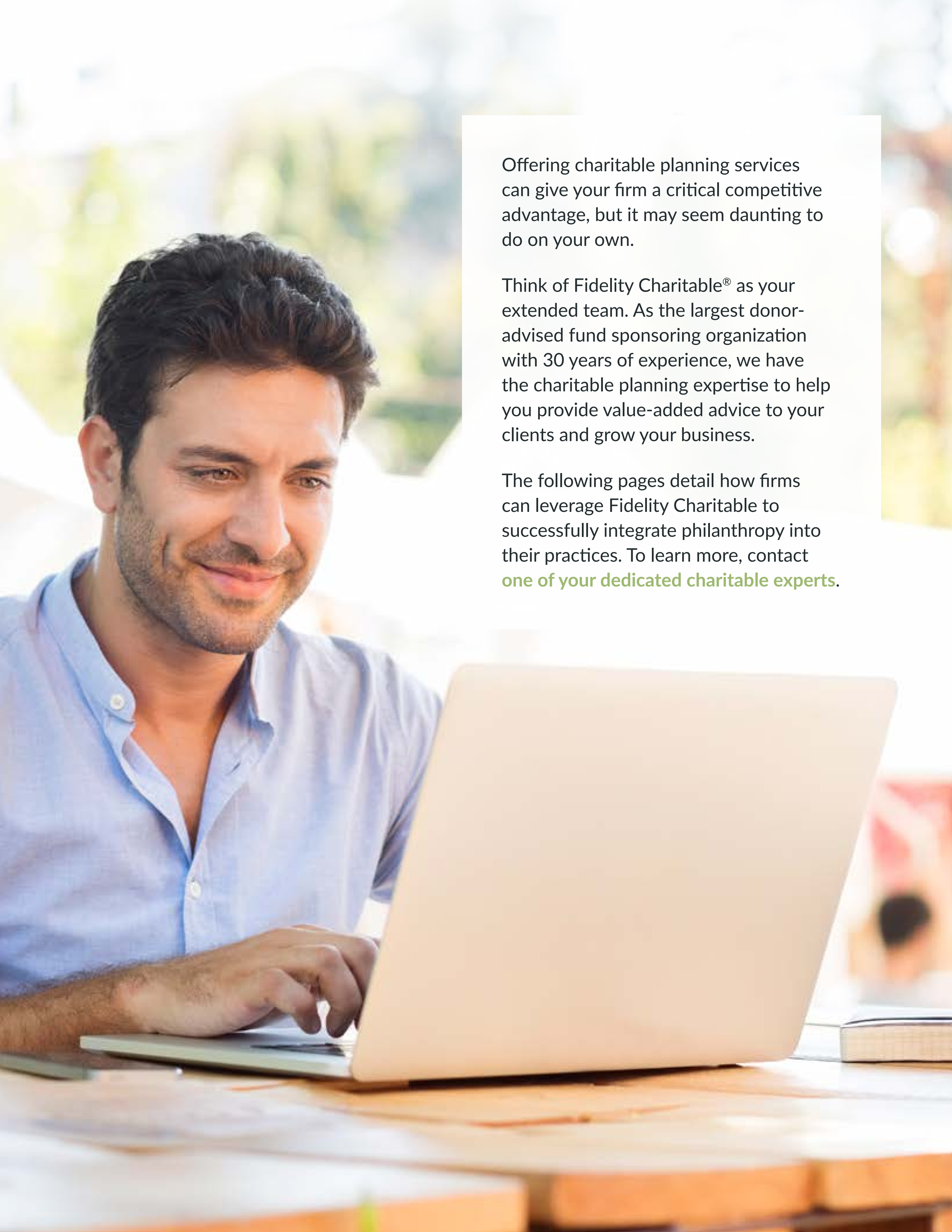
Differentiate Your Practice

with Charitable Planning

FIDELITY Charitable®

Make more of a difference



Offering charitable planning services can give your firm a critical competitive advantage, but it may seem daunting to do on your own.

Think of Fidelity Charitable® as your extended team. As the largest donor-advised fund sponsoring organization with 30 years of experience, we have the charitable planning expertise to help you provide value-added advice to your clients and grow your business.

The following pages detail how firms can leverage Fidelity Charitable to successfully integrate philanthropy into their practices. To learn more, contact one of your dedicated charitable experts.

Our Services and Offerings

Regional Charitable Planning Consultant

Our national team is there to help you understand the details of our donor-advised fund program and support you and your clients with smart charitable giving strategies. **Find your local Charitable Planning Consultant**.

Continuing Education

We host complimentary CE-approved seminars on a variety of topics, including product-agnostic charitable planning, tax strategies, donating non-cash assets, family philanthropy and more!

Year-End Meeting

Meet with your Fidelity Charitable team before the busy season hits and prepare for year-end client conversations.

Advisor Onboarding & Office Hours

Newcomers to your firm will receive personal charitable education and can always reference our **online resource center**. Once onboarded, they can dial in to regular office hours to ask questions, learn the latest charitable trends, and get trained on new client tools and calculators.

Service and Operations Support

Get an introduction to our Advisor Service Team; an opportunity to hear about our business, discuss how to work together in support of your clients, and demo the Giving Account®.

Online Advisor Platform

Through GivingCentral, advisors can manage Giving Accounts online—including opening new accounts, transacting on behalf of clients, and staying informed on Giving Account balances and history.

Charitable Investment Advisor Program

Advisors can be nominated to actively manage the assets their clients contribute to Fidelity Charitable—using their own platform and assessing a fee for their investment services.

Expertise in Donating Non-Publicly Traded Assets

Our in-house team of attorneys helps to turn contributed complex assets (e.g. private equity, S/C-Corp, restricted stock) into proceeds for grant recommendations.

Client Resources

Content for Client Communications

Sign up to receive content that's ready to be shared on your social media channels or within blogs and newsletters. This includes foundational philanthropic content as well as more timely messages specific to recent events or legislation impacting philanthropy.

Guides, Tools & Calculators

Fidelity Charitable has more tools than any other donor-advised fund-sponsoring organization. Share our thought leadership and resources with your clients for smarter, more informed giving.

Client Facing Presentations

Leverage our materials (slides with talking points, email invitations, and client-facing handouts) to deliver your own seminar to clients. Choose from presentations on Charitable Essentials, Tax Strategies, and Gifting Non-Cash Assets.

Ultra-high-net-worth Services

We'll work with your advisors to provide personal guidance and exclusive, high-end service to your most sophisticated clients, as part of the **Private Donor Group**.

Engagement & Learning Opportunities

Fidelity Charitable can provide customized professional development for your advisors as part of our Continuing Education curriculum. Learn about key client segments including multi-generational families, women and business owners. We can also help you design or host a seminar for your clients and prospects.

Contact a **Charitable Planning Expert** to discuss a presentation tailored to your audience. Our available sessions include:

- Tax Strategies
- Charitable Planning Essentials
- Donating Non-Cash Assets
- Private Foundations vs Donor-Advised Funds
- Equity Compensation
- Family Engagement & Succession Planning
- Impact Investing
- Accelerating Relief with Philanthropy
- Women & Giving

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