Document Upload

FIDELITY Charitable®
Make more of a difference

Document Upload enables advisors to digitally upload documents directly to Fidelity Charitable®, eliminating the inconvenience of mail or fax, improving security, and facilitating faster processing times.

To upload a document:

1. **Log in to our advisor platform, GivingCentral:**
   - Fidelity Wealthscape℠ users: Log in to Fidelity Wealthscape℠ and select *Fidelity Charitable®* from the Account or Service menu
   - All other users: Log in to GivingCentral
2. **Click the *Document Upload* button in the upper-right corner of the home page**
3. **Enter the Giving Account® number, document type, and reference number (if linking to a previous upload)**
   - Common document types include:
     - Alternative investment recommendation: Alternative Investment Transaction Request Form
     - Contribution: Irrevocable Contribution Form & LOI, Complex Asset Contribution Form
     - Firm: E&O Insurance Certificate, Investment Advisor Firm Agreement, IRS Form W-9
     - Giving Account® Access: Giving Account Access Form, Agency Agreement
     - Giving Account Maintenance: Giving Account Change Form, Letter of Authorization
     - Giving Account Opening: Donor/CIAP/Organizational Giving Account Application
4. **Add your file and select Upload. If your file is password-protected, contact us for assistance. Do not close your browser until the upload is complete. A confirmation screen will confirm submission of the document.**
5. **Retain the reference number provided for your records.**

Frequently Asked Questions

Do I need access to my client's Giving Account in order to upload a document?

No, any professional advisor or member of your firm can utilize GivingCentral and the Document Upload feature.

Can I upload multiple files at the same time?

Each file must be uploaded individually. The reference number generated by the initial upload allows you to link subsequent submissions.

My firm uses Fidelity Wealthscape℠, but I do not see a Fidelity Charitable link - what should I do?

Request Fidelity Charitable entitlements from your Firm Administrator.

Can I recommend a grant on behalf of my client via Document Upload?

Please use the online grant process to recommend a grant.

Efficient and Secure

Utilizing our digital capabilities is the most efficient and secure way to conduct transactions. GivingCentral enables advisors to open and access a client's Giving Account®, initiate contributions, recommend grants, and much more–all online.

Learn more

Further questions? Contact our Advisor Experience Team at **800-262-6935**.
Our hours of operation are 8:30 a.m-6:30 p.m. ET.