

Corporate giving

A Corporate Giving Account[®] allows business entities¹ to combine the most favorable tax benefits with the flexibility to support charities at virtually any time.²

With a Corporate Giving Account[®], your company can benefit from:



Charitable giving ease



Reduced internal costs



Consolidated reporting

Supporting charities is flexible and easy

- Name the Giving Account, such as ABC Corporation Charitable Fund or ABC Charitable Foundation.
- Easily recommend grants to multiple charities with our bulk grantmaking option.
- Choose from several options to support International grantmaking.
- Set up recurring grant recommendations (monthly, quarterly, semi-annually, and annually).
- Be acknowledged for recommending a grant or recommend the grant anonymously.
- Use our Gift4Giving[®] program to allow for non-Account Holders to support their favorite charities with the amount you select. This can be a great option for employee recognition programs!

Give effectively with appreciated assets

Donors can make a bigger impact by donating long-term appreciated securities to Fidelity Charitable[®], including stock, bonds, and non-publicly traded assets such as restricted stock and private business interests.

Multiple investment options to choose from

Donors may recommend an investment approach from our numerous investment options, including socially responsible investment pools

Dedicated service; simplified recordkeeping

With a Corporate Giving Account, you have access to a dedicated Premium Service Account Manager.

And with our state-of-the-art online platform, you can access Giving Account activity history, confirmations and statements at any time.

Minimums and fees

- \$100,000³—for initial irrevocable contribution.
- \$50—for grant recommendations.
- The administrative fee is tiered, starting at 0.6% annually.
- There is an additional fee of \$10,000 for Corporate Giving Accounts, assessed annually.
- Investment fees range from 0.015% to 0.97%, depending on the investment options you choose.

Contact us today to get started. | fidelitycharitable.org | 800.262.6039

¹ Nonprofits and tax-exempt organizations, including charities under section 501(c)(3) of the Internal Revenue Code, are not eligible to establish a Giving Account.

² Subject to minimum grant activity requirements.

³ There is no minimum initial contribution requirement for an individual Giving Account.