Champions of impact

Advancing purpose through charitable planning

FIDELITY Charitable®

FIDELITY Charitable®



Champions of impact

Advancing purpose through charitable planning

Charitable planning has the power to turn financial strategy into a meaningful legacy. When advisors help clients connect their wealth to their values, planning conversations shift from transactional to transformational. Clients begin reflecting on their life purpose, clarifying their intentions, and envisioning the impact they want to make. While tax considerations may initiate charitable planning conversations, the true value lies in helping clients give with intention.

Advisors who integrate charitable planning into holistic wealth strategies help clients align their financial resources with their values and goals. By offering charitable guidance, advisors can deepen their client relationships while creating meaningful, lasting impact for families, organizations, and communities.

In 2025, Fidelity Charitable® launched the Philanthropic Champion award to recognize advisors committed to advancing philanthropy. This unique program celebrates advisors who are integrating charitable planning into holistic financial strategies and advancing philanthropy in their communities.

Examples and best practices modeled by the 2026 Fidelity Charitable® Philanthropic Champions demonstrate how charitable planning conversations can create meaningful and lasting impact.

2026 Fidelity Charitable Philanthropic Champions

Fidelity Charitable is proud to announce this year's recipients of the Philanthropic Champion award—12 exceptional advisors from across the country who exemplify the power of giving.

The 2026 winners are:

Glenn Ullmann
Ullmann Wealth Partners

Jeffrey Lindsay
Peterson Wealth Advisors LLC

Katie Poole
Pathstone

Brad Sharp
RWA Wealth Partners

Cheryl Young
Rockefeller Capital Management

Benjamin Dickey
Resonant Capital Advisors

John Vande Guchte
Innovia Wealth

Scott Brueske
B3 Wealth Strategies

Nick Johnson
Willis Johnson and Associates

Robert Law
Creative Financial Group, a division of Synovus Securities, Inc.

Caleb "Spuds" Powell
Kayne Anderson Rudnick Investment

Mark Mulvoy
Cresset Asset Management LLC, Cresset Capital

Shepherd clients through moments that matter

One of the hallmarks of the Philanthropic Champions is their ability to recognize when charitable planning can offer clarity for clients during pivotal life moments. During transitions such as divorce, retirement, or the sale of a business, these advisors can help clients navigate change with purpose, reassess their priorities, and align their financial decisions with their values.

But opportunities for strategic giving are not limited to major life changes. You may have clients in your portfolio who are not facing a transition but are still well-positioned for charitable planning opportunities. The following examples highlight some of the many ways advisors can incorporate charitable planning into broader wealth, tax, and legacy discussions.



Appreciated assets

Clients holding stocks or other investments with significant gains may benefit from donating these assets to potentially eliminate capital gains taxes while supporting causes that are meaningful to them.



A high-income year

When clients experience a major liquidity or income event, such as an initial public offering (IPO), an equity compensation payout, a business transaction, or a Roth conversion, they may seek strategies to reduce their tax liability.



Complex assets

Closely held business interests, private company stock, and real estate can present unique charitable planning opportunities. Advisors can help evaluate gifting options and determine how charitable vehicles may fit within broader tax and legacy planning goals.



Alternative investments

Appreciated alternative investments may offer opportunities to incorporate charitable planning into an overall investment and tax strategy. In some cases, donating certain assets may provide greater charitable value than liquidating them and contributing the after-tax proceeds.



Changing tax laws

Tax legislation and regulatory changes can create new charitable planning considerations for clients. When tax rules shift, advisors can help clients evaluate their giving strategies, reassess the timing and structure of charitable gifts, and identify opportunities to align philanthropic goals with changing financial circumstances.



Insufficient itemized deductions

Clients who do not exceed the standard deduction may not realize the tax benefits of all their charitable contributions. Advisors can help explore strategies such as bunching multiple years of donations into a single tax year or using a donor-advised fund to potentially maximize tax efficiency while supporting the causes they care about.



Family engagement

Many families want to involve children and grandchildren in philanthropy as part of broader conversations about stewardship and legacy. Structured giving strategies can help create opportunities for family members to participate in charitable decision-making and build a shared culture of giving.



New client onboarding

Reviewing a client's Schedule A can provide insight into their past giving decisions and open the door to deeper planning conversations.

Strengthen family bonds and multigenerational engagement

While life transitions can open the door to charitable conversations, they also present opportunities to engage the broader family. Philanthropy can help families connect across generations, align around shared values, and engage in conversations about legacy. It can also shift discussions about wealth transfer toward purpose and impact.

For advisors, integrating charitable planning into the broader wealth conversation can deepen relationships and expand their role across the family network. By facilitating shared philanthropic experiences, advisors can help foster collaboration across generations. Many clients want to introduce charitable values to their children and grandchildren as part of broader conversations about stewardship, responsibility, and legacy. Charitable planning tools and family giving programs such as Fidelity Charitable's Gift4Giving® can strengthen multigenerational engagement by giving family members a more active role in philanthropy. Through the program, clients can allocate a portion of their donor-advised fund to a family member who can recommend grants to qualifying charitable organizations, helping make giving a shared, purposeful family experience.

Build trust and deepen client loyalty

Charitable planning can help advisors build stronger client relationships by creating opportunities for discussions about values, legacy, and long-term goals. In a 2024 Fidelity Charitable study, nearly half of registered investment advisors said that charitable planning conversations helped nurture existing client relationships, while 60% reported that these discussions helped attract new clients.

When advisors incorporate charitable planning into broader wealth discussions, they can deliver value beyond traditional financial guidance while helping clients create meaningful impact. These conversations can strengthen trust; deepen engagement across generations; and reinforce the advisor's role as a trusted partner in planning, purposeful giving, and creating a legacy.



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. 1225276.3.0