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Practice Management & Consulting

A premier advisor education program only available at Fidelity Charitable®

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Since 2016, over 31,000 advisors have benefited from our Practice Management & Consulting program.

Content that meets your needs

Whether you're looking for guidance on donating non-publicly traded assets or ideas for engaging families, our comprehensive curriculum covers it all.

Starting Your Charitable Planning Journey

For advisors new to charitable planning who are looking to learn the fundamentals of tax-smart giving

Continuing Your Charitable Planning Journey

For advisors ready to deepen their knowledge of charitable planning, expand their offerings, and prospect new clients

Some content is approved for CFP®, CIMA®, and CPWA® credit.

Education that meets you where you are

Participants will have access to tools, worksheets, and guides to put their education into practice.

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