

# The Endowed Giving Program

## Create a charitable legacy

In order to support your favorite charities after your lifetime, the Endowed Giving Program allows you to set up recurring grant recommendations for up to ten charities for a minimum of five years.<sup>1</sup>

### The Endowed Giving Program at a glance

Recurring grant recommendations can be made on an annual basis, and begin upon the death of the last surviving Account Holder on your Giving Account®.

Your Giving Account® remains open to donations from your estate, which can help offset estate taxes while also ensuring support for the charitable causes you care about.

**Minimum Giving Account balance: \$100,000 at activation<sup>2</sup>**

#### Sources of funding:

- Giving Account balance
- Donations from an estate
- Donations from individuals

### Benefits

By selecting the **Endowed Giving Program** as a successor option, you gain all the advantages of a Giving Account, plus the ability to:

- **Recommend** up to ten qualified public charities to support beyond your lifetime.
- **Choose** a name for your Giving Account that will become effective after your death—while maintaining the flexibility to recommend grants in honor of yourself, a family member or friend, or anonymously.
- **Increase** your Giving Account's balance through additional contributions to Fidelity Charitable® made by family or friends after the death of the last remaining Account Holder.<sup>3</sup>
- **Elect** the Endowed Giving Program as the sole successor option—or in combination with Fidelity Charitable's other successor options.

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**For more information, contact Fidelity Charitable**  
**FidelityCharitable.org | 1.800.280.6357**

<sup>1</sup> Minimum term for the program is 5 years. Funded and invested appropriately, Giving Accounts could continue in perpetuity. Under the terms of the Endowed Giving Program, Fidelity Charitable may expend as much of the Giving Account's income and principal as the Trustees deem appropriate. If the Giving Account balance drops below \$10,000, Fidelity Charitable may distribute the balance, via lump sum grants, to eligible charities as recommended by the Account Holder. See Endowed Giving Program Guidelines for complete details.

<sup>2</sup> The Endowed Giving Program requires a remaining Giving Account balance of \$100,000 upon the death of the last remaining Account Holder.

<sup>3</sup> Additional contribution minimums apply.