

# The Endowed Giving Program of Fidelity Charitable<sup>®</sup>

## Help your clients create a charitable legacy

In order to support your clients' favorite charities after their lifetimes, consider the Endowed Giving Program of Fidelity Charitable<sup>®</sup>. The Endowed Giving Program allows donors to set up recurring grant recommendations for up to six 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 or semiannual basis, and begin upon the death of the last surviving Account Holder of the Giving Account<sup>®</sup>.

The Giving Account<sup>®</sup> remains open to donations from the donor's estate, which can help offset estate taxes while also ensuring support for the charitable causes your client cares about.

Account Holders can recommend how long these recurring grants will continue, for example 10 years, 20 years or in perpetuity.

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

#### Sources of funding:

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

Please see the [Endowed Giving Program Guidelines](#) for complete details.



### Client Benefits

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

- **Recommend** up to six qualified public charities to support beyond their lifetime.
- **Choose** a name for the Giving Account that will become effective after their death—while maintaining the flexibility to recommend grants in honor of themselves, a family member or friend, or anonymously.
- **Increase** the Giving Account's balance through additional contributions to the Gift Fund 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.



### Advisor Benefits

As an Advisor, discussing the **Endowed Giving Program** can help you to:

- **Demonstrate** your expertise as a wealth manager in the specialized area of charitable planning.
- **Deepen client relationships** by discussing planned giving opportunities with your clients.
- **Provide** a charitable giving solution without burdensome administrative or due diligence responsibilities.
- **Develop relationships** with other family members and other referrals.

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

*Fidelity Charitable is the brand name for the Fidelity Investments<sup>®</sup> 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.*

<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.