



Private Donor Group

 **FIDELITY** Charitable®
Make more of a difference



You can make even more of a difference. We can help.

You are uniquely positioned to make a positive difference in the world. With the means to generously support your alma mater, fund new medical research, make a significant donation to an international humanitarian cause, or provide a transformational gift to your favorite art museum, you can drive change.

Whether you're just embarking on your charitable journey or you've been giving for years, the Private Donor Group at Fidelity Charitable® helps you maximize your philanthropic impact today and enhance your legacy for the future.

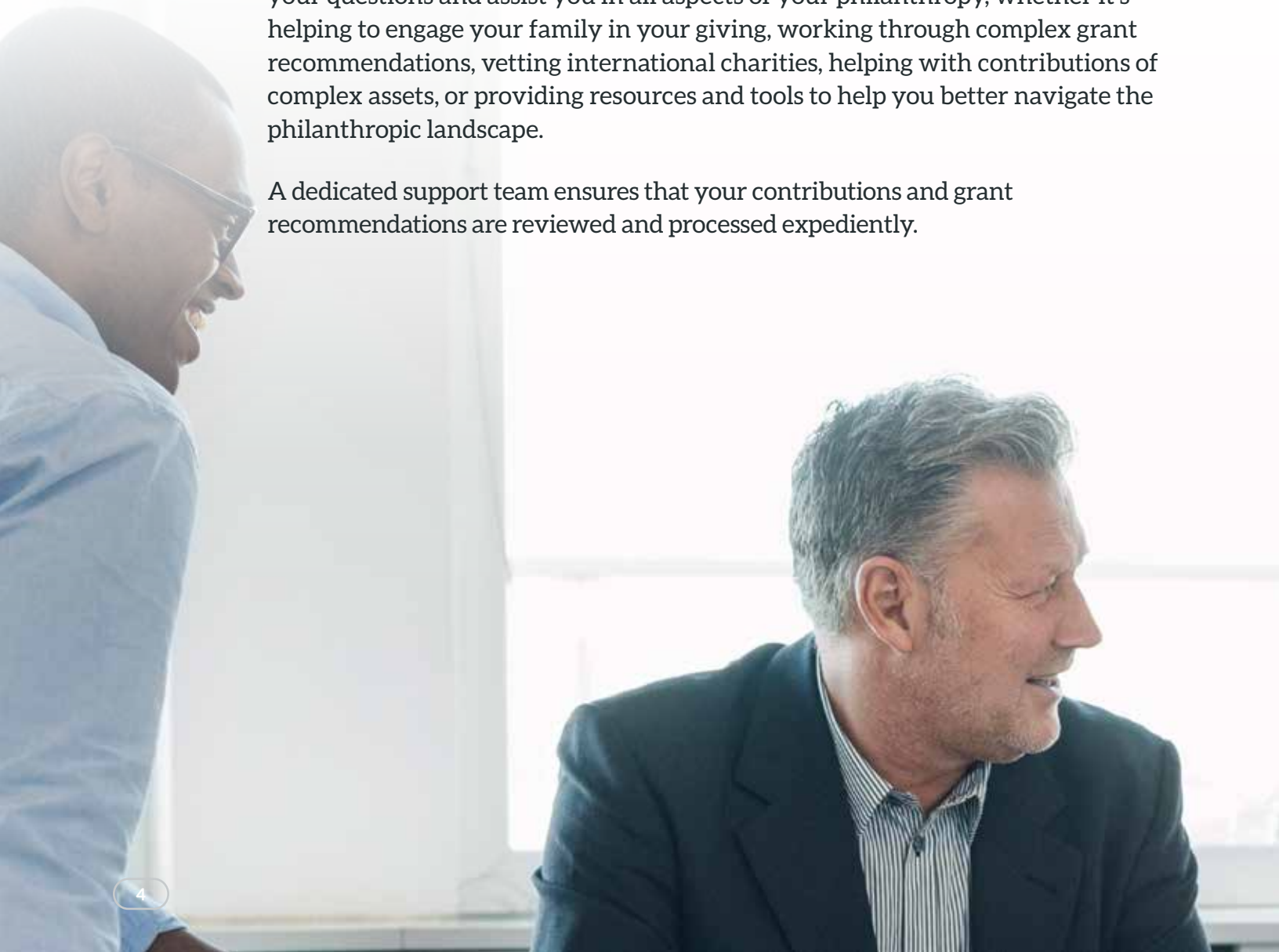
What we do

The Private Donor Group provides personal philanthropic guidance, unmatched due diligence and technical expertise, and exclusive engagement opportunities with fellow philanthropists.

As a member of the Private Donor Group, you have access to world-renowned experts in the field of philanthropy, research that can help you be more impactful with your giving, advice and insights from likeminded donors, and a wide range of other programs that will help you achieve your philanthropic goals.

Your personal Philanthropic Strategist works with you one-on-one to answer your questions and assist you in all aspects of your philanthropy, whether it's helping to engage your family in your giving, working through complex grant recommendations, vetting international charities, helping with contributions of complex assets, or providing resources and tools to help you better navigate the philanthropic landscape.

A dedicated support team ensures that your contributions and grant recommendations are reviewed and processed expediently.



Your Philanthropic Strategist

As a member of the Private Donor Group, you are matched with a personal Philanthropic Strategist who is your first call for philanthropic guidance, grant recommendation advice, assistance developing legacy plans, and so much more. Your Philanthropic Strategist:

- Helps you develop your philanthropic strategy
- Assists with legacy planning and family giving strategies
- Provides tools and resources to guide your philanthropic journey
- Collaborates with your advisors to achieve your philanthropic goals
- Consults on domestic and international grant recommendations
- Provides guidance on the types of assets you may contribute
- Offers education on investment options
- Maintains in-depth knowledge of your Giving Account, including contribution details, grant history, and investment performance and activity
- Provides annual reviews of your Giving Account and your philanthropic plan to make sure you are on track to meet your goals



Your trusted philanthropy team

The Private Donor Group Service team

A dedicated team of service representatives works hand-in-hand with your Philanthropic Strategist to ensure your contributions and grant recommendations are accommodated efficiently and effectively. You'll have direct access to the service team via a dedicated phone line and email address. The Private Donor Group Service Team:

- Ensures priority processing of transactions, including:
 - Contributions to Fidelity Charitable
 - Grant recommendations from your Giving Account to a public charity
 - Allocation of investments within a Giving Account
 - Administrative updates to Giving Account information
- Proactively provides information on transactions requiring additional research

Technical expertise

In addition to the Service Team, as a Private Donor Group member you have access to a team of technical experts. Our team of technical experts:

- Processes contributions of complex assets
- Vets domestic and international charities
- Reviews gift agreements to ensure commitments may be funded from a donor-advised fund
- Executes complex and international grants
- Reviews proposals



Family guidance

The Private Donor Group team is committed to fostering family engagement in philanthropy, and your Philanthropic Strategist can:

- Facilitate philanthropic discussions with your family and heirs
- Help you develop your philanthropic legacy plan
- Provide valuable resources addressing family dynamics, transitions within families, and how to engage the next generation in philanthropy
- Help you determine the right way to use a Giving Account with your family based on your individual circumstances
- Provide technical support to link family Giving Accounts

Next Gen Fellows Program

In addition, each year Fidelity Charitable hosts the Next Gen Fellows program. This unique program is designed for emerging philanthropists (aged 18–40) and provides the next generation of givers insight into their charitable goals, passions, and values while learning how to be more impactful givers. Private Donor Group members and their families are invited to participate in this exclusive program.

Philanthropic Research Program

The Philanthropic Research Team provides information and resources to answer donor's questions, support their grant recommendation strategy and empower them to be strategic in their giving.

Based on a donor's needs, we develop:

- Customized briefs or curated resources about specific charitable causes
- Information on specific organizations
- Lists of nonprofits addressing specific issues, perhaps in certain regions or to serve specific populations, based on donor preference

Connect with ideas, individuals, and innovations

Philanthropic Advisor Referral Network

If you're looking to dive deep into a specific issue area or to create a complex philanthropic plan, Fidelity Charitable can provide you with access to a network of philanthropic advisors. A complement to the expertise of your Philanthropic Strategist, a philanthropic advisor provides extensive sector knowledge and can assist with a broad range of services, including:

- Creating a detailed strategic plan for philanthropic impact
- Providing sector-specific research
- Identifying potential grantees
- Measuring, evaluating, and reporting on grant effectiveness

Supporting international charitable causes

Supporting charitable organizations outside of the U.S. can be an important part of your philanthropic plan. As a Private Donor Group member you may recommend grants from your Giving Account directly to an eligible international charity.

You may also support an international organization through a U.S.-based intermediary nonprofit. The Private Donor Group team can work with you to identify appropriate intermediaries that can create customized programs for your specific international charitable objectives.



Engagement opportunities

The Private Donor Group team hosts a number of exclusive events designed to connect likeminded philanthropists. Ranging from small dinners with guided discussions about how to be more impactful givers, to larger events focused on particular issue areas, Private Donor Group events convene donors from across the country.

Fidelity Charitable also sponsors a number of conferences and symposia that focus on philanthropy and provides exclusive access and discounts for Private Donor Group members who wish to attend these events.

Thought leadership

Fidelity Charitable and the Private Donor Group produce leading-edge thought leadership focused on philanthropic best practices and trends. In addition, we collaborate with experts in the field to create focused research specifically for Private Donor Group members. From articles and white papers, to interactive tools, there are a variety of resources to help you along your philanthropic journey.



What you can give

The most common donations to Fidelity Charitable are cash and appreciated securities. However, donating assets that are not publicly traded may be an effective and tax-efficient method of giving that allows you to contribute more. You may contribute cash or cash equivalents and appreciated securities, as well as complex assets, to your Giving Account. The Complex Assets Group at Fidelity Charitable provides guidance through the entire contribution process. The Complex Assets Group:

- Simplifies the process of donating appreciated, non-publicly traded assets
- Guides the entire contribution process
- Helps donors understand the tax impact of their charitable contributions
- Provides guidance for contributions made near in time to liquidity events

Assets you may contribute

- Cash and cash equivalents (by check, wire, or Electronic Funds Transfer)
- Publicly traded stock and bonds
- Restricted stock, control person stock, or stock subject to a lock-up
- Mutual fund shares
- Private company stock (S-Corp and C-Corp)
- LLC and limited partnership interests
- Restricted stock
- Oil and gas royalty interests
- Bitcoin
- Certain alternative investments



Grow your donation

Investment options

The Private Donor Group team can help you decide how you would like the assets in your Giving Account to be invested. We provide many investment options, one or a combination of which may be selected:

- Asset Allocation Pools – for donors seeking diversification of multiple asset classes within a single investment pool, with the added benefits of professional management and experienced security selection.
- Single Asset Class Pools – for donors looking for exposure in a single asset class or who wish to build a custom strategy combining pools with specific investment objectives.
- Sustainable and Impact Investing Pools – for donors who are interested in a socially responsible investment strategy that seeks both financial return and social good.
- Charitable Legacy Pool – for donors with a Giving Account balance of \$50,000 or more who are looking to implement a long-term giving strategy to achieve their philanthropic goals.
- Charitable Investment Advisor Program – for donors with a Giving Account that meets the the required minimum balance who would like to nominate their investment advisor to manage all or a portion of the Giving Account balance.
- Charitable DonorFlex Program – for donors who wish to recommend investment of their Giving Account assets among mutual funds, treasuries, ETFs, hedge funds, and private equity funds. Requires a Giving Account balance of \$5 million or more.



Sustainable and Impact Investing

Many donors have become increasingly interested in impact investing, which exemplifies the idea that one can “do well while doing good” with one’s investments. In other words, one can purposefully make investments that help achieve certain social and environmental benefits and also generate financial returns. It’s a broad term that refers to everything from investing in organizations with an explicit social mission aligned with one’s values to avoiding investing in companies with practices that one believes have a negative social or environmental impact.

As a member of the Private Donor Group, you have several options for impact investments within your Giving Account. You may recommend:

- That funds within your Giving Account be invested in a sustainable or impact investing pool
- A grant to an impact investing charity
- A recoverable grant to a charity
- Investments in socially responsible mutual funds or ETFs*
- Investments in socially responsible fixed-income products, such as community and green bonds*
- Investments in impact-oriented private equity or venture capital funds*

**Account must be enrolled in the Charitable Investment Advisor Program (CIAP); or the Charitable DonorFlex Program; investments in socially responsible mutual funds, ETFs, or fixed-income products at the discretion/recommendation of the CIAP Advisor, recommendations of private equity, venture capital, or SRI hedge funds are subject to review and approval by Fidelity Charitable.*



Plan for the future

Legacy planning is complex, but your Philanthropic Strategist can work with you to customize your approach to help ensure philanthropic impact today and beyond.

You may name an individual to take over as Account Holder, a charity to receive grants, or both. You may also recommend recurring grants for five years or longer through the Endowed Giving Program.

Individual successor

Many donors choose to name one or more family members, or other close individuals, to take over their Giving Account. These successors become the new Account Holders, able to make donations and recommend investments and grants. In turn, they can name their own successors. This option continues the tradition of giving for generations to come.

Both individuals and charities

A third option is to specify a percentage of your Giving Account for an individual successor, with the rest to be granted out to a charity or charities. This option lets you continue a family tradition of giving, but also ensures future support for your favorite charities.

Charities

As an alternative to naming a family member or friend to manage your Giving Account in your absence, you can designate a charity, or charities, to receive the proceeds of your Giving Account as a lump sum. This option gives you the greatest influence over how your Giving Account balance will be used in the future.

Endowed Giving Program

More than simply naming a charity as a successor, the Endowed Giving Program lets you set up recurring grant recommendations to up to six charities for a minimum of five years. This lets your Giving Account remain open to donations from your estate (such as personal property or other assets), which can help offset estate taxes while also ensuring support for the causes you care about.



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fidelitycharitable.org/private-donor-group | Phone: 800-874-7940 | Fax: 877-665-4274

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