

# 144/145 Contribution Form

Use this form to make irrevocable contributions to a Fidelity Charitable® Giving Account® or a Giving Account® that is enrolled in the Charitable Investment Advisor Program (CIAP). All required fields are marked with an asterisk (\*).

## 1. Donor Information

Who is making this irrevocable contribution to Fidelity Charitable? The information provided will be used to generate a tax receipt to the person or entity (e.g., trust, partnership, or corporation) making the irrevocable contribution.

Giving Account Number*	Giving Account Name

Account Holder       Third-Party Donor

First Name*	M.I.	Last Name*

Entity

Entity Legal Name (e.g., The Smith Family Trust)

### Contact Information

Phone numbers are for questions about this request only; they will not update your Fidelity Charitable contact information.

Preferred Phone*			
Address*			
City*	State/Province*	ZIP/Postal Code*	Country*
Social Security or Tax Identification Number*			

Check one.     U.S. citizen     U.S. resident alien

## 2. Asset Information

### Relationship to the Company

Check all that apply.

- None
- Officer
- Director
- Control Person/10% Shareholder

Are you or is any member of your household an officer, director, control person, affiliate, or holder of more than 10% of the outstanding shares of the company?

Yes     No

If yes, answer the following questions. Include shares owned by family members, trusts, or estates of which you or your family member serves as trustee, executor, administrator, grantor, guardian, or in any similar capacity, or corporations, partnerships, or other entities or organizations in which you or your family has a 10% or greater beneficial interest.

How many shares of the company do you own?

Number of Shares

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How many shares of the company's securities have you sold in the past three months? Include shares sold by any person whom you have acted in concert with for the purpose of selling securities of the company.

Securities Sold By	
Number of Shares Sold	Sale Date MM DD YYYY

Are there any agreements (e.g., a shareholder's agreement or registration rights agreement), contractual restrictions, lock-up agreements, or stop transfer orders relating to these securities?

Check one.

- Yes *If yes, obtain a copy and send to Restricted Stock Services and provide details.*
- No

Details

**How were the securities acquired?**

**Location of Securities**

Check all that apply.

- Private placement
- In lieu of payment services
- Warrant exercise
- Stock dividend, stock split, reverse split, or recapitalization
- Gift, pledge, or from a trust or estate
- Merger or company buyout
- Partnership distribution
- Other

- Restricted shares in my account
- Restricted shares held in book entry form at transfer agent
- Control shares in my account
- Control shares held in book entry form at transfer agent
- Restricted and Control shares in my account
- Restricted and Control shares held in book entry form at transfer agent

**3. Irrevocable Contribution**

**Acquisition of Shares Being Donated**

Security Name Company		Symbol	
Date acquired MM DD YYYY	Number of shares	Date acquired MM DD YYYY	Number of shares

Note: For assets coming from Fidelity Investments® accounts, if tax lots are not specified, the irrevocable contribution will be processed using the account's default disposal method.

Note: For assets coming from financial institutions other than Fidelity, tax lots entered are provided to the firm from which the assets are transferring. Fidelity Charitable® cannot guarantee the tax lots will be delivered at the time of the transfer.

**3A. Assets from a Fidelity Investments Account**

Contribute the following stock held at Fidelity. All trades are transacted in whole shares. If a partial share is provided, Fidelity Charitable will round down to the next whole number unless the entire position is being contributed.

Fidelity Account Number*

By signing this form, You (an account owner of a Fidelity brokerage account) are 1) authorizing National Charitable Services LLC ("NCS") to accept instructions from You and/or your Authorized Interested Party/Agent/Advisor ("Your Agent") to transfer cash and securities from a Fidelity nonretirement brokerage account to Fidelity Charitable, as a charitable contribution, without requiring additional written instructions from You; and 2) authorizing Fidelity Brokerage Services LLC and National Financial Services LLC to act on such instructions directly from NCS without additional authorizations from You. This authorization shall apply only to nonretirement Fidelity brokerage accounts on which You are registered as an owner ("Fidelity Account"), and in the case of Your Agent, for which Your Agent has been authorized with full trading authority or asset movement authorization level 1 or 2. This authorization will be relied upon only when You or Your Agent provides contribution instructions to Fidelity Charitable. Note: This is a one-time authorization.

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### 3B. Stock Certificates Held Outside of Fidelity

#### Stock Certificates Held in Personal Possession

Contribute the following stock certificates. *Note: Please obtain a **Medallion Signature Guarantee** stamp on the stock certificate. When endorsing the certificate(s) write "National Financial Services LLC" between the words "appoint" and "attorney" in the space provided on each certificate. **Date and Sign** the certificate exactly as your name(s) appears on the front. Mail certificate along with this form via registered mail.*

Name of Stock*	Number of Shares*
Certificate Number(s)	

### 3C. Contribute Securities Held at a Financial Institution Other than Fidelity

*Note: If you are transferring Restricted Stock, please select Option 2. Fidelity Charitable® must initiate the transfer on your behalf, which will take approximately three to six weeks to complete.*

- Option 1: I will initiate the transfer of assets by completing the following step:  
 1) Complete this form and mail or fax to Fidelity Charitable®. Fax: 877-665-4274. Note: A separate form must be filled out for transfers from separate financial institutions.
- OR**
- Option 2: I authorize Fidelity Charitable to initiate the transfer of assets by completing the following steps:  
 1) Complete this form and mail or fax to Fidelity Charitable. Fax: 877-665-4274.  
 2) Include a copy of the most recent account statement from which the assets will be transferred.

**FROM:**

Delivering Firm Name*		Delivering Firm Account Number*	
Address*			
City*	State/Province*	ZIP/Postal Code*	Country*

#### Delivery Instructions

Delivery instructions for contributing assets held outside Fidelity Investments:

#### DTC-Eligible Securities

Deliver to DTC Clearing 0226  
 Account Number: Z97-000442  
 FBO: Fidelity Charitable Giving Account Number: \_\_\_\_\_

**Note to Broker-Dealers:** For delivery instructions, visit [FidelityCharitable.org/docs/broker-dealer-instructions.pdf](http://FidelityCharitable.org/docs/broker-dealer-instructions.pdf).

## 4. Company Contact Information

Company counsel contact that can confirm the shares may be gifted/re-registered:

Name	Title
Phone	Email
Comments/Other pertinent information	

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# 5. Investment Selection

## A. Managed Investments

This section is only for Giving Accounts enrolled in the Charitable Investment Advisor Program (CIAP).

Please note: All contributions can be transferred directly to the managed account. Any contributions that are transferred to the Fidelity Z97-000442 will be transferred in kind to the advisor-managed account and will only be liquidated if the brokerage account is not custodied with Fidelity NFS.

**Control Shares must be liquidated upon receipt. Control Shares are not eligible for in-kind transfers.**

If you would like your contribution to be allocated to the Giving Account investment pools, as opposed to the managed account, please proceed to section B below.

Managed Account Number \_\_\_\_\_

## B. Investment Pool Selection

Please recommend how you would like to allocate your irrevocable contribution. If you do not make a recommendation, your contribution will be allocated to reflect the current pool allocation of your Giving Account. If your account is unfunded, your contribution will be allocated to the Conservative Income pool.

**Please Note: If a pool is selected below, your asset(s) will be liquidated and allocated to the selected pool(s).**

Check one.

Allocate this irrevocable contribution in the same percentages as my current investment pools.

OR

Allocate this irrevocable contribution as follows:

Choose from option 1, 2, 3, 4, or a combination of the four. The combined total must equal 100%.

### Option 1: Charitable Legacy Pool Percentage of Total

For donors seeking an "all-weather" asset allocation pool with exposure to both traditional and non-traditional asset classes.

Charitable Legacy \_\_\_\_\_ %

### Option 2: Asset Allocation Pools Percentage of Total

For donors seeking instant diversification to multiple asset classes in a single investment.

Aggressive Growth (85% Equity) \_\_\_\_\_ %

Growth (70% Equity) \_\_\_\_\_ %

Moderate Growth (60% Equity) \_\_\_\_\_ %

Balanced (50% Equity) \_\_\_\_\_ %

Moderate Income (40% Equity) \_\_\_\_\_ %

Income (30% Equity) \_\_\_\_\_ %

Conservative Income (20% Equity) \_\_\_\_\_ %

### Option 3: Sustainable and Impact Investing Pools Percentage of Total

For donors who seek strategies that consider social and environmental factors, while emphasizing financial returns.

#### Stock

Sustainable U.S. Index \_\_\_\_\_ %

Sustainable U.S. Index Access \_\_\_\_\_ %

Sustainable International Index \_\_\_\_\_ %

Environmental Impact Access \_\_\_\_\_ %

#### Bond

Sustainable U.S. Bond Index \_\_\_\_\_ %

### Option 4: Single Asset Class Pools Percentage of Total

For donors who want to build a custom strategy combining pools with specific investment objectives for Giving Account balances.

#### Domestic Stock

U.S. Equity \_\_\_\_\_ %

U.S. Equity Access \_\_\_\_\_ %

Total Market Index \_\_\_\_\_ %

#### Foreign Stock

International Equity \_\_\_\_\_ %

International Equity Access \_\_\_\_\_ %

International Index \_\_\_\_\_ %

#### Bond

Fixed Income \_\_\_\_\_ %

Fixed Income Access \_\_\_\_\_ %

U.S. Bond Index \_\_\_\_\_ %

Short-Term Fixed Income Access \_\_\_\_\_ %

Inflation Protected Bond Index \_\_\_\_\_ %

#### Money Market

Money Market \_\_\_\_\_ %

COMBINED TOTAL MUST EQUAL: **1 0 0** %

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## 6. Signatures and Dates

By signing below, you:

- Acknowledge that you have read the current *Fidelity Charitable Policy Guidelines: Program Circular* and (for CIAP account holders) the *Charitable Investment Advisor Program: Investment Policies and Guidelines* and agree to the terms and conditions described therein.
- Understand that any contribution, once accepted by the Trustees, represents an irrevocable contribution to Fidelity Charitable and is not refundable.
- Approve the Letter of Authorization if Section 3A is completed.
- Acknowledge that you did not receive goods or services in exchange for, or in consideration of, this irrevocable contribution.
- Understand that, if you are a third-party contributor, you may be eligible for a tax deduction, but you will not obtain any Giving Account advisory privileges.
- Certify that to the best of your knowledge, all information presented in connection with this form is accurate.
- Will promptly notify Fidelity Charitable in writing of any changes.

In connection with the charitable contribution of the number of the Shares of Common Stock of the Company listed below:

Number of Shares e.g., 1,234	Write out the number of shares e.g., One thousand two hundred thirty-four
Company Name	

Donor or Authorized Party Name*
Date* MM DD YYYY
<b>DATE</b> ▶
Signature*
<b>SIGN</b> ▶

**AUTHORIZED FOR FIDELITY USE ONLY**  
 ▼ MEDALLION SIGNATURE GUARANTEE ▼

Additional Signatory Name* (if dual signatures are required by firm)
Date* MM DD YYYY
<b>DATE</b> ▶
Signature*
<b>SIGN</b> ▶

**AUTHORIZED FOR FIDELITY USE ONLY**  
 ▼ MEDALLION SIGNATURE GUARANTEE ▼

Note: For FCCS  
 Advisors only  
 (AMA <sup>1</sup> or <sup>2</sup>).

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Under the policies of Fidelity Charitable, and in accordance with the anti-money laundering regulations applicable to the various financial institutions that provide financial services to Fidelity Charitable, we obtain, record, and may verify information that identifies each person who establishes a Giving Account at Fidelity Charitable, and other people who contribute or have access to the Giving Account.

*What this means:* Fidelity Charitable will ask for the name, address, Social Security number, date of birth, and other information that will allow us to identify people with access to the Giving Account. We may also ask to see individual driver's licenses or other identifying documents, and we may verify the information we obtain.





Mail this form to Fidelity Charitable:

OR

Fax the form to Fidelity Charitable:

**Regular mail**

Fidelity Charitable  
PO Box 770001  
Cincinnati, OH 45277-0001

**Overnight mail**

Fidelity Charitable  
100 Crosby Parkway KC1D-FCS  
Covington, KY 41015-4325

877-665-4274

**If the delivering broker requires an original signature, you must mail the form to Fidelity Charitable. We cannot accept an original signature via fax.**

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. Giving Account is a registered service mark of the Trustees of Fidelity Charitable. 442647.6.0 (09/2022)

