

# Donor Application

If you prefer to complete your application online, visit **FidelityCharitable.org**. Type or print clearly in CAPITAL letters and black ink. If you need more room for information or signatures, make a copy of the relevant page. **All fields marked with an asterisk (\*) are required.**

## Helpful to Know

- To contribute securities or mutual funds held at a firm other than Fidelity, the attached Letter of Instruction is required.
- To contribute cash, securities, or mutual funds held in a nonretirement Fidelity brokerage account, check the box in Section 9 for authorization and disregard the attached Letter of Instruction.

## 1. Account Holder

All Account Holders named on the Giving Account<sup>®</sup> have **full and equal privileges**. There can be up to four Account Holders, with one person serving as the Primary Account Holder to whom all Giving Account<sup>®</sup> correspondence will be sent, with the exception of confirmations related to contributions made by Additional Account Holders. Attach additional sheets, if necessary.

### Primary Account Holder

*This will appear on Giving Account<sup>®</sup> correspondence.*

First Name*	M.I.	Last Name*	Social Security or Taxpayer ID Number*
Salutation <i>e.g., Dr. and Mrs. John Smith; Joan and John Smith</i>			
Date of Birth* <i>MM DD YYYY</i>	Email*		
Evening Phone	Daytime Phone*	Extension	

#### Citizenship\*

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

### Legal Address

*Provide the address used for tax reporting. Cannot be a P.O. Box, mail drop, or c/o.*

Address*			
City*	State/Province*	ZIP/Postal Code*	Country

### Mailing Address

Same as legal/residential address

Address*			
City*	State/Province*	ZIP/Postal Code*	Country

### Additional Account Holder *Optional*

First Name*	M.I.	Last Name*	Social Security or Taxpayer ID Number*
Salutation <i>e.g., Dr. and Mrs. John Smith; Joan and John Smith</i>			
Date of Birth* <i>MM DD YYYY</i>	Email*		
Evening Phone	Daytime Phone*	Extension	

#### Citizenship\*

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

**Additional Account Holder continues on next page. ►►**





**Legal Address**

Address*			
City*	State/Province*	ZIP/Postal Code*	Country

**Mailing Address**

Same as legal/residential address

Address*			
City*	State/Province*	ZIP/Postal Code*	Country

**2. Giving Account Name**

Grants made to charities are accompanied by a letter that includes the Giving Account name, unless anonymity is specifically requested.

Giving Account Name* <i>e.g., Smith Family Fund</i>
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**3. Advisor Information**

Advisor Name	Firm Name
Phone Number	Advisor Email Address <i>Optional</i>

*If an advisor guided you in the decision to establish a Giving Account, please fill out this section.*

*See Section 4 if you wish to authorize Giving Account access for an advisor.*

**Mailing Address**

Address			
City	State/Province	ZIP/Postal Code	Country

Check one.

- Accountant
- Estate planning attorney
- Financial advisor
- Other:

Describe
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**OR**

**Fidelity Representative**

Fidelity Representative	Name of Branch
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**4. Authorizing an Advisor or Other Interested Party**

You may authorize an individual other than an Account Holder to receive duplicate statements, obtain information, and/or perform transactions on your behalf. Please complete a Giving Account Access Form, included in each Giving Account opening kit. This form is also available online at **FidelityCharitable.org** or by contacting Fidelity Charitable® at 800-952-4438.

Form continues on next page. ►►



# 5. Successor Election

For more details, refer to the Program Circular, available online at [FidelityCharitable.org](http://FidelityCharitable.org).

Account Holders can name individuals (Individual Account Holders) to succeed them on the Giving Account and/or may recommend IRS-qualified public charities (Charitable Organizations) to receive part or all of the balance and/or may recommend the Endowed Giving Program. If no successor is elected upon notification of the death of the last remaining Account Holder, the Trustees will redeem the remaining units in the Giving Account and distribute the proceeds to the Trustees' Philanthropy Fund. You may specify more than one successor for each option (attach additional sheets), and **you may choose any combination of the two successor options. (Total successor allocation among the two options must total 100% and must be whole percentages only.)**

## A. Individual Account Holder *Attach additional sheets if more than one Account Holder.*

				% of Giving Account
				%
First Name*	M.I.	Last Name*	Social Security or Taxpayer ID Number*	
Date of Birth* MM DD YYYY		Email	Relationship to Account Holder	

### Legal/Residential Address

Provide the address used for tax reporting. Cannot be a P.O. Box, mail drop, or c/o.

Address*			
City*	State/Province*	ZIP/Postal Code*	Country

### Citizenship\*

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

## B. Charitable Organization *Attach additional sheets if more than one organization.*

		% of Giving Account
		%
Organization Name*	Federal Taxpayer ID Number*	
Phone		

Note: Family trusts cannot be named as charitable organizational successors on the Fidelity Charitable Giving Account.

### Mailing Address

Address*			
City*	State/Province*	ZIP/Postal Code*	Country

COMBINED TOTAL OF SECTIONS A AND B MUST EQUAL Total  
1 0 0 %

Successor Charitable Organizations are reviewed (1) at initial recommendation, (2) upon the death of the last remaining Account Holder, and (3) before every recommended or scheduled grant distribution.

### Endowed Giving Program \$100,000 minimum

Account Holders who wish to support charitable organizations beyond their lifetime by providing ongoing grants to up to six (6) charitable beneficiaries may enroll in the Endowed Giving Program. A \$100,000 minimum Giving Account balance is required at activation, which occurs at the death of the last remaining Account Holder. Please refer to the Program Circular and the Endowed Giving Program Enrollment Form found online at [FidelityCharitable.org](http://FidelityCharitable.org) for eligibility and further details.

Form continues on next page. ►►

## 6. Irrevocable Contribution *\$5,000 Minimum Initial Donation*

Complete the applicable section below and check the appropriate box. If your employer matches charitable contributions to charities with donor-advised fund programs, please include the appropriate company paperwork. *NOTE: Securities held for one year or less are generally deductible at the lesser of cost basis or fair market value.<sup>1</sup>*

### Cash Held at Fidelity

Contribute cash held at Fidelity

Cash Transfer Amount*	Fidelity Account Number*
\$	

### Securities or Mutual Funds Held at Fidelity

Contribute the following securities or mutual funds held at Fidelity. *Note: All trades are transacted in shares. If you prefer to indicate a dollar amount, we will make a current estimate (based on the previous business day's closing share price) of the number of shares needed to reach the dollar amount indicated. However, due to market conditions at the close of the market on the day the transaction is processed, the amount may be above or below the dollar amount you indicated. Fidelity Brokerage customers, see Section 9.*

Security/Mutual Fund Name*	Symbol*	Fidelity Account Number*
Number of Shares*	Approximate Dollar Amount <i>Optional</i>	
	\$	
Security/Mutual Fund Name*	Symbol*	Fidelity Account Number*
Number of Shares*	Approximate Dollar Amount <i>Optional</i>	
	\$	

### Cash Equivalents

*Fidelity Charitable® will not accept contributions of currency or certain cash-like monetary instruments, including cashier's checks, treasurer's checks, bank checks, official checks, bank drafts, traveler's checks, postal money orders, or money orders.*

Check

Check Amount*
\$

Make checks payable to Fidelity Charitable Gift Fund and reference the Giving Account number or name in the memo section.

Wire

Wire Amount*	Bank Name*
\$	

Wire to: JPMorgan Chase Bank, New York, NY, ABA Number: 021000021 For credit to: National Financial Services LLC, Account: 066196-221 For benefit of: Fidelity Charitable Gift Fund, Z97-000442. For further credit to: Name and Giving Account Number (if known). **Fidelity Charitable will not initiate this wire transfer.**

### Securities or Mutual Funds Held at a Firm Other than Fidelity

Contribute securities or mutual funds held at a firm other than Fidelity. *A completed Letter of Instruction is required. Please refer to the attached Letter of Instruction Form for mailing instructions.*

### Stock Certificates Held in Personal Possession

Contribute the following stock certificates. *Note: Endorse certificate(s) by writing "National Financial Services LLC" between the words "appoint" and "attorney" in the space provided on the back of each certificate. Date and sign the certificate exactly as your name(s) appears on the front.*

Name of Stock*	Number of Shares*
Name of Stock*	Number of Shares*

### Other Contributions

Contribute restricted stock, shares held at the company/transfer agent, private placements, stock from dividend reinvestment plans (DRIPs), or real estate. *Call Fidelity Charitable at 1-800-952-4438 for instructions.*

Form continues on next page. ►►





## 7. Investment Pool Selection

Recommend how to allocate your contribution by choosing from Option 1, 2, 3, or 4, or a combination of the four. Combined total must be 100% and only whole percentages will be accepted. If you do not make a recommendation for an initial contribution, your contribution will be allocated to the Conservative Income Pool. Please review pool descriptions before making your recommendation. Descriptions are available at [FidelityCharitable.org](https://www.fidelity.com/charitable) or by calling us at 800-952-4438.

*For donors seeking instant diversification to multiple asset classes in a single investment. These pools have a mix of stocks, bonds, and short-term instruments that range from a higher equity allocation mix to a lower equity allocation mix.*

*Our Pool Selector at [FidelityCharitable.org](https://www.fidelity.com/charitable) may help you select an Asset Allocation Pool based on your giving goals and investment risk tolerance for your Giving Account.*

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

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

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

Option 1: Asset Allocation Pools	Percentage of total
<input type="checkbox"/> Aggressive Growth (85% Equity)	_____ %
<input type="checkbox"/> Growth (70% Equity)	_____ %
<input type="checkbox"/> Moderate Growth (60% Equity)	_____ %
<input type="checkbox"/> Balanced (50% Equity)	_____ %
<input type="checkbox"/> Moderate Income (40% Equity)	_____ %
<input type="checkbox"/> Income (30% Equity)	_____ %
<input type="checkbox"/> Conservative Income (20% Equity)	_____ %
Option 2: Single Asset Class Pools	Percentage of total
<b>Domestic Stock</b>	
<input type="checkbox"/> U.S. Equity	_____ %
<input type="checkbox"/> U.S. Equity Access	_____ %
<input type="checkbox"/> Total Market Index	_____ %
<b>Foreign Stock</b>	
<input type="checkbox"/> International Equity	_____ %
<input type="checkbox"/> International Equity Access	_____ %
<input type="checkbox"/> International Index	_____ %
<b>Bond</b>	
<input type="checkbox"/> Fixed Income	_____ %
<input type="checkbox"/> Fixed Income Access	_____ %
<input type="checkbox"/> U.S. Bond Index	_____ %
<input type="checkbox"/> Short-Term Fixed Income Access	_____ %
<b>Money Market</b>	
<input type="checkbox"/> Money Market	_____ %
Option 3: Sustainable and Impact Investing Pools	Percentage of total
<input type="checkbox"/> Sustainable U.S. Index	_____ %
<input type="checkbox"/> Sustainable U.S. Index Access	_____ %
<input type="checkbox"/> Sustainable International Index	_____ %
<input type="checkbox"/> Environmental Impact Access	_____ %
Option 4: Charitable Legacy Pool	Percentage of total
<input type="checkbox"/> Charitable Legacy	_____ %
COMBINED TOTAL MUST EQUAL:	<b>1 0 0</b> %

Form continues on next page. ►►





## 8. Referral *How did you learn about Fidelity Charitable?*

- Advertisement
- Article
- Mailing from Fidelity Charitable
- Mailing from Fidelity Investments
- Web *FidelityCharitable.org*
- Advisor
- Fidelity branch or phone representative
- Other Fidelity employee
- Family/friend/colleague
- Fidelity Charitable donor
- Other

In which publication?
In which publication?

Name <i>Complete Section 3.</i>
Name <i>Complete Section 3.</i>

Name <i>Optional</i>

Describe

## 9. Fidelity Brokerage Customers Only

**By checking this box**, You (an account owner of a Fidelity brokerage account) are 1) authorizing National Charitable Services Corp. ("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. This authorization is subject to the terms and conditions described below. Please read these terms and conditions carefully and retain them for your records.

### Terms and Conditions

By granting this authorization, You understand and agree that Fidelity Brokerage Services LLC, National Financial Services LLC, and National Charitable Services Corp. (collectively hereinafter "Fidelity"), and Fidelity Charitable will not undertake to confirm Your Agent's representations or instructions or to monitor Your Agent's compliance with your instructions to him or her and will rely solely upon the instructions of Your Agent for these transfers. You understand that You should carefully review your account documentation and monitor all activity in your Fidelity Account and your Giving Account® at Fidelity Charitable. Fidelity or NCS may require direct instructions from You on transactions over a certain dollar amount. Upon requests for any account-related activity in your Fidelity Account or your Giving Account® at Fidelity Charitable from Your Agent, Fidelity and/or Fidelity Charitable reserves the right, but is not obligated, to confirm with You any of your or Your Agent's instructions prior to acting on them and to restrict or not accept requests for these transfers, at its/their own discretion. Your Agent is authorized to act for You and on your behalf in the same manner and with the same force and effect as you might or could do to the extent necessary or incidental to the furtherance or conduct of the Fidelity Account in accordance with this authorization or your separate standing instructions. Your Agent will not conduct activity in your Fidelity Account that exceeds its authority under this authorization or any other agreement governing your Fidelity Account(s). This authorization shall be applicable to all assets you hold in your Fidelity Account(s). No Fidelity entities are affiliated with Your Agent (excluding, however, Strategic Advisers, Inc.), and have no relationship except as described in this authorization. Neither Fidelity nor Fidelity Charitable will have any duty to inquire into the authority of Your Agent to engage in particular transactions or to monitor the terms of any oral or written agreement between You and Your Agent. Your Agent is obligated to comply with, and make all disclosures as required by, all applicable state, federal, and industry securities laws and regulations, and interpretations promulgated thereunder, including but not limited to the Investment Advisers Act of 1940, the Securities Exchange Act of 1934, the Investment Company Act of 1940, and the NASD Rules and/or FINRA rules. Neither Fidelity nor Fidelity Charitable will undertake to confirm or ensure that Your Agent remains in compliance with its obligations. You agree to indemnify and hold harmless Fidelity Brokerage Services LLC, National Financial Services LLC, National Charitable Services Corp., and Fidelity Charitable and any of its affiliates and their respective officers, directors, employees, and agents from and against any and all losses, claims, or financial obligations (including reasonable attorneys' fees) that may arise from any act or omission of Your Agent with respect to your Fidelity Account or Giving Account at Fidelity Charitable. This authorization is a continuing one and shall remain in full force and effect until either Fidelity or Fidelity Charitable is notified in writing of your disability, incapacity, or death, or unless revoked through written notice actually received by either Fidelity or Fidelity Charitable. Such revocation, however, shall not affect any prior liability in any way resulting from any transaction initiated before receipt of the revocation. Furthermore, it is understood that this authorization

Fidelity Brokerage Customers Only continues on next page. ►►



and indemnity is in addition to, and in no way restricts, any rights that may exist at law or under any other agreement(s) between You and Fidelity Brokerage Services LLC, National Financial Services LLC, National Charitable Services Corp., or Fidelity Charitable. This authorization and indemnity shall be construed, administered, and enforced according to the laws of the Commonwealth of Massachusetts. It shall inure to the benefit of Fidelity and Fidelity Charitable, and of any successor organization(s) (whether by merger, consolidation, or otherwise) irrespective of any change(s) at any time in the personnel thereto for any cause whatsoever and to the benefit of the affiliates and the assigns of Fidelity or Fidelity Charitable or any successor organization. It is further understood that Fidelity and/or Fidelity Charitable reserves the right to cease accepting instructions from You or Your Agent at its sole discretion and for its sole protection.

## 10. Signatures and Date

By signing below, you:

- Acknowledge that you have read the current *Fidelity Charitable Policy Guidelines: Program Circular* and agree to its terms and/or conditions described therein.
- Understand that any contribution, once accepted by the Trustees, represents an irrevocable contribution to Fidelity Charitable and is not refundable.
- 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.
- Acknowledge that you did not receive goods or services in exchange for, or in consideration of, this contribution.

Primary Account Holder Name*	
Primary Account Holder Signature*	Date* MM DD YYYY
<b>SIGN</b> ▶	▶

**Note: Signature dates must be within 90 days of receipt of the form to be accepted for processing.**

Additional Account Holder Name*	
Additional Account Holder Signature*	Date* MM DD YYYY
<b>SIGN</b> ▶	▶

Under 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.

**Did you sign the form and attach any necessary documents?**

Send the form and any attachments to Fidelity Charitable.

**Questions?** Go to [FidelityCharitable.org](http://FidelityCharitable.org) or call 800-952-4438.

**Regular mail**

Fidelity Charitable  
P.O. Box 770001  
Cincinnati, OH 45277-0001

**Overnight mail**

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

OR

Fax the form to: 877-665-4274

Information provided is general and educational in nature. It is not intended to be, and should not be construed as, legal or tax advice. Fidelity Charitable does not provide legal or tax advice. Content provided relates to taxation at the federal level only. Availability of certain federal income tax deductions may depend on whether you itemize deductions. Rules and regulations regarding tax deductions for charitable giving vary at the state level, and laws of a specific state or laws relevant to a particular situation may affect the applicability, accuracy, or completeness of the information provided. Charitable contributions of capital gain property held for more than one year are usually deductible at fair market value. Deductions for capital gain property held for one year or less are usually limited to cost basis. Consult an attorney or tax advisor regarding your specific legal or tax situation.

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. Fidelity Charitable and Fidelity are registered service marks, and the Fidelity Charitable logo is a service mark, of FMR LLC, used by Fidelity Charitable under license. Giving Account is a registered service mark of the Trustees of Fidelity Charitable. 559235.11.0 (10/2018)



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# Letter of Instruction Information

Use this **Letter of Instruction ONLY** if you are transferring securities or mutual funds held at a firm other than Fidelity. If you are transferring cash, refer to the instructions on the Contribution Form or the Donor Application.

## Helpful to Know

- Complete the Letter of Instruction on pages 2 and 3, following. All parties who are registered on the delivering firm's account(s) must sign the letter.
- Submit documentation according to the following instructions:

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### FOR MUTUAL FUNDS HELD AT A FIRM OTHER THAN FIDELITY

#### Mail to Fidelity Charitable®:

- Original Letter of Instruction.
- Copy of a recent statement from the transferring mutual fund company.
- Donor Application or Contribution Form.

Do not send anything to the transferring mutual fund company.

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### FOR STOCKS HELD AT A FIRM OTHER THAN FIDELITY

#### Mail to Fidelity Charitable

- Donor Application or Contribution Form

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### FOR DIVIDEND REINVESTMENT PLANS *DRIPs*

Call Fidelity Charitable at 800-952-4438 for instructions.

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. Fidelity Charitable and Fidelity are registered service marks, and the Fidelity Charitable logo is a service mark, of FMR LLC, used by Fidelity Charitable under license. Giving Account is a registered service mark of the Trustees of Fidelity Charitable.





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# Letter of Instruction

Type or print clearly in CAPITAL letters and black ink. If you need more room for information or signatures, use a copy of the relevant page. **All fields marked with an asterisk (\*) are required.**

## 1. Donor Instructions

**Complete and deliver this Letter of Instruction as follows:**

Mutual funds (two to four weeks to complete transfer from receipt of instructions): Mail letter with mutual fund statement and completed Contribution Form or Donor Application to Fidelity Charitable®.

Securities: Mail original letter along with a completed Contribution Form or Donor Application to Fidelity Charitable®. If shares are part of a DRIP, please call Fidelity Charitable at 800-952-4438 for instructions.

Delivering Broker's Firm*		Broker Name*	
Date* MM DD YYYY	Broker Daytime Phone*		Extension
Address*			
City*		State*	ZIP*

### Transfer instructions

**FROM:**

Outside Firm Account Number*
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**TO:**

Fidelity Charitable® Giving Account® Number*
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**Note to Broker-Dealers** — this account number is not the valid delivery brokerage account. See the Broker-Dealer Instructions in the following section.

Number of Shares*	Approx. Dollar Amount <i>if known</i>	OF	Security/Mutual Fund Name*
	\$		Security/Mutual Fund Name*
Number of Shares*	Approx. Dollar Amount <i>if known</i>		OF
	\$	OF	Security/Mutual Fund Name*
Number of Shares*	Approx. Dollar Amount <i>if known</i>	OF	Security/Mutual Fund Name*
	\$		

Form continues on next page. ►►

## 2. Signatures and Dates

Please accept this Letter of Instruction as my authorization to irrevocably transfer the above positions from my account with your firm to Fidelity Charitable.

Owner Name*	
DATE	Date* MM DD YYYY
SIGN	Owner Signature*

AUTHORIZED FOR FIDELITY USE ONLY  
 ▼ MEDALLION SIGNATURE GUARANTEE ▼

Owner/Authorized Individual Name*	
DATE	Date* MM DD YYYY
SIGN	Owner/Authorized Individual Signature*

AUTHORIZED FOR FIDELITY USE ONLY  
 ▼ MEDALLION SIGNATURE GUARANTEE ▼

## 3. Broker-Dealer Instructions

Deliver all eligible securities per these instructions. **Shares should be transferred in kind and are not to be liquidated.**

For credit to: National Financial Services LLC    For benefit of: Fidelity Charitable Giving Account [number]  
 DTC: 0226  
 Account Number: Z97-000442

Any physical deliveries (i.e., certificates) should be sent via registered mail to:  
 Fidelity Charitable, 100 Crosby Parkway, Mail Zone KC1D-FCS, Covington, KY 41015-9325

### **Mutual Fund Transfers Only**

If NFS cannot accommodate the transfer of the positions above, this document will be accompanied by a letter of instruction to transfer the above shares to an account at your firm in the name of Fidelity Charitable. In such circumstances, please accept this letter as instruction and authorization to transfer the shares to the Fidelity Charitable account at your firm.

### **Transfer Agents**

For DRS-eligible securities, do not open a DRS account. The transfer will be initiated by the receiving firm.

<p><b>Did you sign the form and attach any necessary documents?</b>          Send the form and any attachments to Fidelity Charitable.</p> <p><b>Questions?</b> Go to <a href="http://FidelityCharitable.org">FidelityCharitable.org</a> or call 800-952-4438.</p>	<p><b>Regular mail</b>          Fidelity Charitable          P.O. Box 770001          Cincinnati, OH 45277-0001</p> <p>OR</p> <p><i>Fax the form to: 877-665-4274</i></p>	<p><b>Overnight mail</b>          Fidelity Charitable          100 Crosby Parkway          Mail Zone KC1D-FCS          Covington, KY 41015-4325</p>
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