Giving Account® Change Form

Use this form to make changes to Giving Account® information. Sections 1 and 6 are required.

Please 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.

1.	Acc	ount	Ho	lder

	First Name	M.I.	Last Name		Siving Account Number			
Phone numbers are for questions about								
his request only; they	Evening Phone		Daytime Ph	one	Extension			
will not update your Fidelity Charitable®								
contact information.								
2. Remove	Your Name as Acco	ount Ho	lder					
	Check here to authorize remassume Giving Account priv				e there is another Account Holder to on 3 below.			
3. Change	or Add Account Ho	lder						
Check one.	☐ Update Current Informatio	n. Complete	the informati	on in the fields bel	ow.			
		·						
					al privileges to recommend grants, ditional Account Holders with the sar			
					Account Holder, with the exception			
					older. There can be up to four Accou			
	also sign in Section 6.	neets, it nece	ssary. Ine cu	rent Account Hol	der and the new Account Holder m			
	☐ Mr. ☐ Mrs. ☐ Miss	☐ Ms. ☐	□ Dr. □	Prof.				
	First Name	M.I.	Last Name		Social Security or Taxpayer ID Num			
	Date of Birth MM DD YYYY Em	ail						
	Evening Phone		Daytime Ph	one	Extension			
		1 1 1						
Legal Address								
Provide the address	Address							
used for tax reporting. Cannot								
be a PO Box,	City		State/Province ZIP/Postal Code		Country			
Mail Drop, or c/o.								
Mailing Address				I				
Maining Address	Come so legal/residential se	l droop						
	Same as legal/residential address Address							
	nudless							
	City	State/	Province	ZIP/Postal Code	Country			
			Chanc	e or Add Accoun	t Holder continues on next page			

1.893510.106 Page 1 of 4 018410201

3. Change or Add Ac	count Holder, continued
Citizenship	
Check one.	U.S. citizen
	U.S. resident alien
Salutation	
This will appear on Giving Account correspondence.	Address Salutation e.g., Dr. and Mrs. John Smith; Joan and John Smith
4. Change (Giving Account Name
	Grants are accompanied by a letter from Fidelity Charitable® that includes the Giving Account name, unless anonymity is specifically requested.
	Giving Account Name
5. Change (Giving Account Successor Recommendations
For more details, refer the Program Circular,	Account Holders may name individuals to succeed them on the Giving Account (Individual Account Holders), and/or may recommend IRS-qualified public charities to receive part or all of the balance (Charitable Organizations).

to available online at FidelityCharitable.org 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 com**bination of the two successor options. (Total successor allocation among the two options must total 100%.)

Please see page 3 for information about an additional option, the Endowed Giving Program.

Α.	Individual	Account Holder	r Attach additional	sheets it	more than one
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								% of Giving	Account
									%
	First Name		M.I.	Last Name			Social Security or	Taxpayer ID	Number
	Date of Birth MM DD YYYY	Email				Relationship to A	Account Holder		
	Legal/Residential Address								
Provide the address used for tax reporting. Cannot	Address								
be a PO Box, Mail Drop, or c/o.	City		State/I	Province	ZIP/Postal Code	Countr	у		
	Citizenship								
Check one.	U.S. citizen								
	U.S. resident alien								

Change Giving Account Successor Recommendations continues on next page.

1.893510.106 018410202 Page 2 of 4

B. Charitable Organization Attach additional sheets if more than two

				% of Giving Account
Organization #1				%
Organization Name			Taxpayer ID Nur	mber
			1 1 1	
Phone				
Mailing Address				
Address				
City	State/Province	ZIP/Postal Code	Country	
	1	1	1	J
				% of Giving Account
Organization #2				%
Organization Name			Taxpayer ID Nur	nber
Phone				
Mailing Address				
Address				
City	State/Province	ZIP/Postal Code	Country	

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** for eligibility and further details.

Form continues on next page.

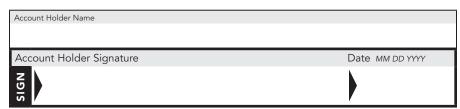
1.893510.106 Page 3 of 4 018410203

6. Signature(s)

Account Holder Signature

By signing below, you:

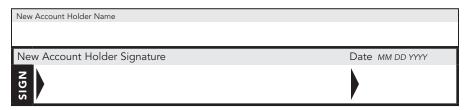
- Acknowledge you have read the current Fidelity Charitable Program Guidelines and agree to its terms and/or conditions described therein.
- Certify that to the best of your knowledge all information presented in connection with this form is accurate.
- Will promptly notify Fidelity Charitable in writing of any changes.



New Account Holder Signature Any new Account Holder added in Section 3 must sign here. Attach additional sheets, if necessary.

By signing below, you:

- Acknowledge you have read the current Fidelity Charitable Program Guidelines and agree to its terms and/or conditions described therein.
- 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.



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 to Fidelity Charitable or have access to the Giving Account.

What this means for you: When you establish a Giving Account, we will ask for the name, address, 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 form and any attachments to Fidelity Charitable.

Questions? Go to FidelityCharitable.org or call 1-800-952-4438.

Fax the form to: 1-877-665-4274

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Mail the form to: Fidelity Charitable PO Box 770001 Cincinnati, OH 45277-0053

Fidelity Charitable is the brand name for 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. 590381.3.0 (11/2022)

1.893510.106 Page 4 of 4 018410204