

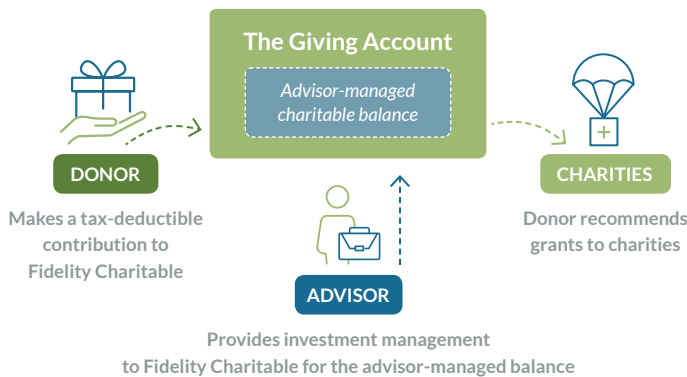
Charitable Investment Advisor Program

Actively manage your clients' charitable contributions

The Charitable Investment Advisor Program at Fidelity Charitable[®] allows eligible independent investment advisors to actively manage the Fidelity Charitable[®] assets contributed by their clients, and assess a fee for their investment services. With this program, your clients benefit from the simple and effective features of our donor-advised fund program while maintaining your trusted expertise.

How it works

1. Donors with a Giving Account[®] that meets the minimum balance requirement of \$100,000¹ are eligible to nominate a qualified independent investment advisor.
2. Once qualified, you can manage Fidelity Charitable's assets in a client's Giving Account in an open architecture, including alternative assets.²
3. When donors are ready to make grant recommendations, Fidelity Charitable will work directly with you to ensure that enough funds are available to meet their granting goals.³



Client benefits

By selecting the Charitable Investment Advisor Program, clients gain all the advantages of a Giving Account[®], as well as these added benefits:

- Trusted professional advice for their Giving Account from their independent investment advisor.
- A more customized asset allocation than is currently available through the existing Fidelity Charitable investment pools, which may better match their charitable giving goals.
- A comprehensive portfolio that aligns charitable giving with their overall financial plans.

Advisor benefits

As an advisor, you'll be able to:

- **Differentiate** yourself by providing solutions to your clients' charitable giving needs.
- **Provide** professional investment management and enjoy increased investment flexibility.
- **Assess** an advisory fee for your investment services.
- **Build** holistic portfolios that expand charitable giving strategies into overall wealth management plans.
- **Access** a dedicated advisor service team to support your unique servicing needs.

¹ For more information, contact us at 800-262-6039.

² Fidelity Charitable has established rigorous qualification criteria for independent advisors to ensure that Fidelity Charitable assets are being invested prudently and in accordance with the Fidelity Charitable Mission and Declaration of Trust. Please see The Charitable Investment Advisor Program: Description & Investment Policies and Guidelines for investment policies and guidelines and advisor qualification requirements. The Trustees administer the program, monitor the advisors' investment performance, and oversee advisor compliance with the Fidelity Charitable Investment Policies and Guidelines statement.

³ A portion of the Giving Account balance can be invested in one or a combination of the Fidelity Charitable investment pools, enabling Fidelity Charitable to fund grants efficiently without the delay caused by having to liquidate advisor-managed charitable balances. Fidelity Charitable will direct the liquidation of advisor-managed charitable balances if a grant recommendation is made that cannot be funded with the Giving Account balance in the Fidelity Charitable investment pools.

Contact us today to get started. | fidelitycharitable.org | 800.262.6039