

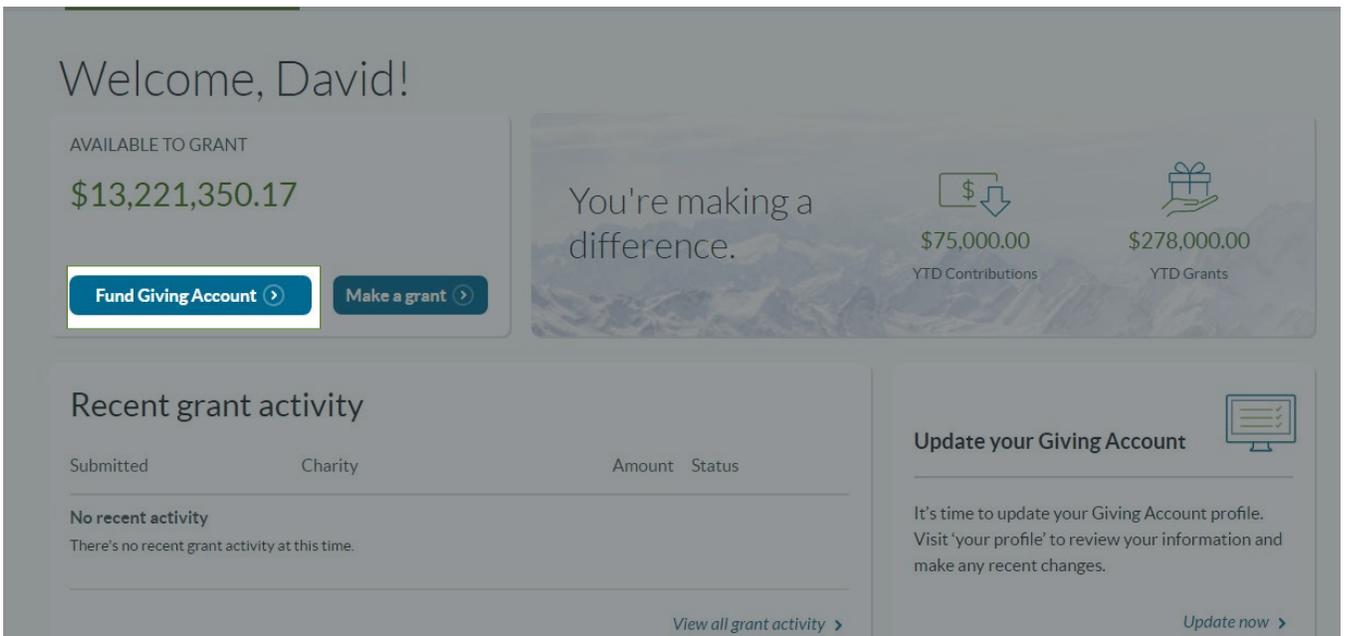
HOW-TO 

Contribute to Fidelity Charitable[®]

Fidelity Charitable[®] accepts a wide range of financial assets, from cash and checks to stocks and even non-publicly traded assets like private business interests.

Here's how to easily make your tax-deductible donation to us:

1. Log in to your [Giving Account](#)[®].
2. Click the "Fund Giving Account" button.



Welcome, David!

AVAILABLE TO GRANT
\$13,221,350.17

[Fund Giving Account](#)  [Make a grant](#) 

You're making a difference.

 \$75,000.00 YTD Contributions	 \$278,000.00 YTD Grants
--	--

Recent grant activity

Submitted	Charity	Amount	Status
No recent activity There's no recent grant activity at this time.			

[View all grant activity](#) 

Update your Giving Account



It's time to update your Giving Account profile. Visit 'your profile' to review your information and make any recent changes.

[Update now](#) 

3. Choose your funding source.

← Back to Giving Account summary 1117473 Family Fund | Giving Account #1117473

Fund your Giving Account

Transform the way you give with a tax-smart contribution to Fidelity Charitable.

1 Allocating a contribution to the advisor managed account can only be done from certain funding sources at this time. For questions, please contact us at 800-952-4438.

Please select which account you would like to contribute from:

Fidelity accounts

Choose an account ▼

Banks linked for EFT

Non-Fidelity accounts

[Eligible Fidelity accounts >](#)

[Continue >](#)

Your contributions at a glance

\$0.00 YTD	\$100,000.00 2023	\$0.00 2022
---------------	----------------------	----------------

Learn more about funding your account

[Important deadlines ↗](#)

[Contribution FAQs ↗](#)

[What you can donate ↗](#)

[How-to: Contribute to Fidelity Charitable ↗](#)

a. **From a Fidelity account**

Select from your Fidelity positions and the amount you would like to donate

← Back to fund your Giving Account 1117473 Family Fund | Giving Account #1117473

1 > Select assets
2 > Select investments
3 > Confirm & submit

Select assets from account: X01961189 - INDIVIDUAL ? Help

View all assets
Choose from positions and purchase history

View most appreciated securities
Choose from purchase history sorted by gain

Have an amount in mind you'd like to contribute?
Use this calculator to see how you could contribute from your most appreciated assets.
[Consider your long-term appreciated securities.](#)

[Calculate >](#)

Cash

Symbol	Amount available	Amount to contribute
<hr/>		
Total Cash ⓘ	\$48,739,898.80	<input style="width: 100px;" type="text" value="\$"/>
<hr/>		
FDRXX FIDELITY GOVERNMENT CASH RESERVES	48,997.890	<input style="width: 100px;" type="text"/>

Securities ⓘ Default disposal method: Last In, First Out ⓘ

Expand to see purchase history	Symbol	Term	Gain/Loss	Est market value	Last price	Cost basis	Quantity available/total shares	Quantity to contribute
--------------------------------	--------	------	-----------	------------------	------------	------------	---------------------------------	------------------------

b. **Electronic Funds Transfer from a bank**

Add or select a bank account, the amount you would like to donate, and whether it is a one-time or recurring contribution

← Back to fund your Giving Account Demo Account Family Charit... | Giving Account #1053934

1 > Contribution details 2 > Investment selection 3 > Confirm and submit

[Help](#)

Contribute from a bank account

Contribute cash from your bank account using an electronic funds transfer.

Select a bank account:

[Add a bank account +](#)

Bank name	Account type	Account number
<input checked="" type="radio"/> ABC Bank	Checking	*****1234

Enter the amount to contribute:

Amount: \$

Timing:

c. **From a non-Fidelity brokerage account**

Enter the financial institution name, account number, security type, security symbol, number of shares, and the estimated value

← Back to fund your Giving Account 1117473 Family Fund | Giving Account #1117473

1 > Non-Fidelity account 2 > Contribution selection 3 > Investment Selection 4 > Review & sign

[Help](#)

Contribute assets from a Non-Fidelity account

To get the information you'll need to complete this contribution, it's best to use a statement from the delivering firm account for reference.

Individual accounts held by account holders of this Giving Account are eligible for digital signature.

Delivering firm information

All fields required unless otherwise noted as optional

Delivering firm name:

Account type:

Broker name:

optional

Email:

optional

Phone:

Fax:

optional

Address line 1:

4. Recommend an investment allocation.

← Back to fund your Giving Account | 1176 Family Fund | Giving Account #1176

1 > Select assets | 2 > Select investments | 3 > Confirm & submit

Investment selection

Choose from the categories below to advise Fidelity Charitable on how to invest funds in your Giving Account. [View all pool performance](#)

Allocate this contribution in the same percentages as the current Giving Account.¹

Choose a single, diversified investment strategy
Asset allocation pools

Pool name	Performance: Cumulative YTD	Net expense ratio	Market value	Recommended %
Asset Allocation 85% Equity 85% Equity, 15% Fixed Income	3.89 %	0.74 %	\$465,987,231.45	<input style="width: 50px;" type="text" value="%"/>
Asset Allocation 70% Equity	4.06 %	0.72 %	\$815,477,657.07	<input style="width: 50px;" type="text" value="%"/>

5. Confirm the details of your contribution and submit.

Frequently Asked Questions

Will I receive a tax deduction?

When you donate to your Giving Account®, you can take the same tax deductions as donating to any public charity.

Do I need to maintain a minimum balance?

You do not have to maintain a minimum balance.

Are there any timing considerations?

Contributions must be received by December 31 to be eligible for a tax deduction in the same year. Some assets take longer to accept and process than others, and you may need to initiate your donation early. [See all year-end contribution date guidelines.](#)

What happens when Fidelity Charitable® receives my contribution?

Fidelity Charitable will allocate the proceeds of the contribution to your Giving Account and purchase units of each investment pool recommended for the Giving Account. When a contribution is received and accepted, it is irrevocable and is owned and controlled by the Fidelity Charitable Trustees.

Conducting transactions online is the easiest and most efficient way to use your Giving Account.

Don't see what you're looking for?

Call **1-800-952-4438** to speak with a member of our Donor Services team. We look forward to helping you fulfill your charitable giving goals.