

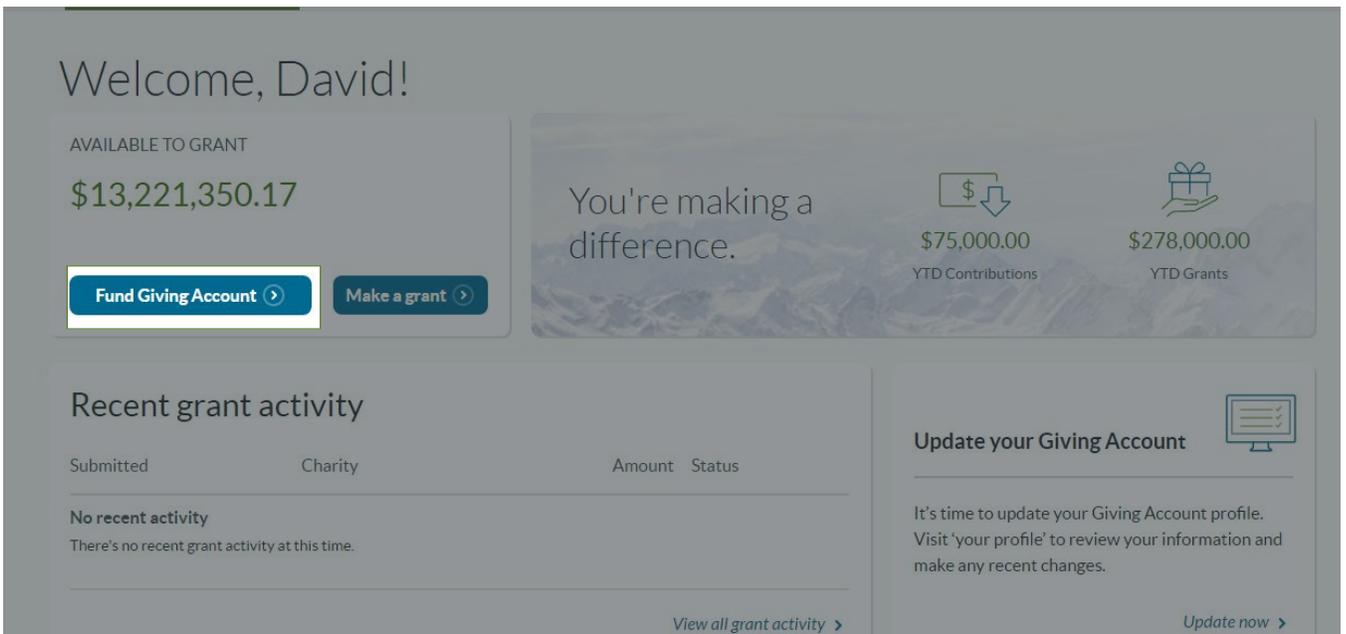
HOW-TO 

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.



Dashboard screenshot for David's Giving Account. The page shows a welcome message, available grant amount of \$13,221,350.17, and two buttons: "Fund Giving Account" (highlighted) and "Make a grant". A summary section shows "You're making a difference" with YTD Contributions of \$75,000.00 and YTD Grants of \$278,000.00. Below is a "Recent grant activity" table with columns for Submitted, Charity, Amount, and Status, showing "No recent activity". A "Update your Giving Account" section prompts the user to update their profile.

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

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.