

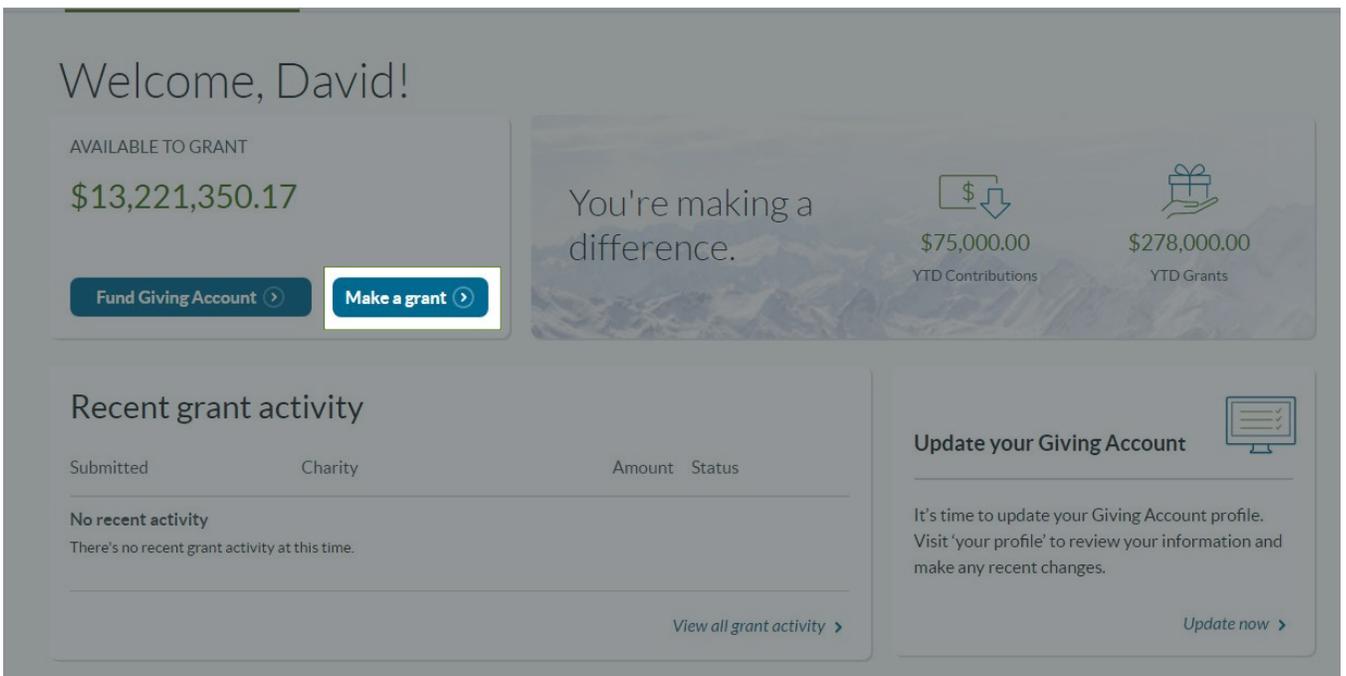
HOW-TO 

Recommend a grant from your Giving Account[®]

The Giving Account[®] lets you support most qualified 501(c)(3) public charities, with a few exceptions, with a minimum grant amount of just \$50.

Here's the grant recommendation process (you can also recommend a grant using our iOS app):

1. Log in to your [Giving Account](#).
2. Click the "Make a grant" button.



The screenshot shows the Fidelity Giving Account dashboard. At the top, it says "Welcome, David!". Below this, there's a section for "AVAILABLE TO GRANT" showing a balance of \$13,221,350.17. There are two buttons: "Fund Giving Account" and "Make a grant". To the right, a summary section says "You're making a difference." and displays two metrics: "YTD Contributions" at \$75,000.00 and "YTD Grants" at \$278,000.00. Below this is a "Recent grant activity" section with a table header: Submitted, Charity, Amount, Status. The table is currently empty, with a message: "No recent activity. There's no recent grant activity at this time." At the bottom right, there's a section for "Update your Giving Account" with a checklist icon and text: "It's time to update your Giving Account profile. Visit 'your profile' to review your information and make any recent changes." There are also links for "View all grant activity" and "Update now".

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. Click the "Find a charity" button or browse the charities you've supported previously.

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

1 > Enter grant details 2 > Allocate funds 3 > Confirm & submit

Help

Add grants to your list

Enter grant details and then add to your grants list to start recommending grants to one or more of your favorite charities.

Search your charities Viewing: Last 2 years

AMERICAN NATIONAL RED CROSS
DISASTER RELIEF
Charity details

Last grant on 9/13/2022 for \$1,000.00
Grant history

Recurring monthly

Amount: \$
Use: Where it's needed most
Acknowledgement: Name and Address
Timing: ASAP

Add to list

Grant list

Available to grant \$26,250.16

Grants added: (0)

Add grants from your charity list on the left

Total to grant \$0.00

Next step

- a. Can't find what you're looking for after clicking the "Find a charity" button? Scroll to the bottom of that page and click "Recommend a charity." Enter the Tax ID number (use the [Guidestar](#) tool to look it up) to help us identify it.
4. Enter the amount, how the grant should be used, acknowledgment details, and whether it is a one-time, future, or recurring grant recommendation.

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

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Total to grant \$0.00

Next step

- 5. Allocate funds from your Giving Account. Select from the pools in which your contributions are invested and enter the amount to draw from each pool.

← Back to Giving Account summary 1055981 Family Fund | Giving Account #1055981

1 > Enter grant details 2 > Allocate funds 3 > Confirm & submit

Allocate funds ? Help

Tell us how you would like your grant recommendations to be funded. The chart below shows how the money in the Giving Account is currently invested. Enter the percentage or dollar amount you'd like to be drawn from each investment pool.

Quick allocation: Money Market funds first Same percentages as current balance

Pool	Units	NAV	Market value	Pool allocation	Grant allocation*	Amount
Money Market	234.077	13.81 -	\$3,232.61	0%	<input type="text" value="100%"/>	<input type="text" value="\$ 1,000.00"/>
Asset Allocation 50% Equity	440,181.754	13.81 ↑	\$6,078,910.02	100%	<input type="text" value="%"/>	<input type="text" value="\$"/>
Environmental Impact Access	0.001	15.02 -	\$0.02	0%	<input type="text" value="%"/>	<input type="text" value="\$"/>

Funds allocation

Grants added: (1)

Total to grant
\$1,000.00

[Next step >](#)

- 6. Confirm the details of your grant recommendation and submit.

Frequently Asked Questions

How do I know my favorite charity is eligible?

Find out if it is a 501(c)(3) public charity by checking the charity's website, [Guidestar](#), or by calling them directly.

What exactly does 501(c)(3) mean?

501(c)(3) refers to the tax-exempt status of a nonprofit organization as qualified under IRS rules. Because 501(c)(3) organizations are charitable in nature, they are allowed to receive tax-deductible donations from donors like you.

Can I support international charities?

You have two options for using your Giving Account to support causes outside the U.S. You can recommend a grant to an American charity that works overseas, or you can recommend a grant to an American intermediary that will make a grant to your preferred organization for an additional fee. To learn more about our foreign charities options, visit our [Charities you can support](#) page.

How often do I have to recommend a grant?

A grant every two years is required to fulfill the minimum granting requirement. After two years in which no grants are distributed from a Giving Account, Fidelity Charitable® will grant 5% from the Giving Account balance to an IRS-qualified public charity approved by the Trustees of Fidelity Charitable®. Fidelity Charitable will make every effort to contact you regarding your inactive Giving Account.

Can I have a checkbook associated with my Giving Account?

All grant recommendations are subject to review and approval before issuing; therefore, checkbooks are not provided to donors, and Fidelity Charitable sends all grant funds directly to the charity grant recipients.

How is my information shared with recipient charities?

We encourage donors to provide their name and address to nonprofits with each grant they recommend. However, you may choose to grant partially anonymously or fully anonymously.

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.