

FIDELITY CHARITABLE®

Virtual Resource Guide

 **FIDELITY** CharitableSM
Make more of a difference

Executive Summary

In these uncertain times, Fidelity Charitable® seeks to support you and your clients with virtual resources to provide professional development for your advisors as well information to serve and educate your clients and prospects.

As the country's largest donor-advised fund sponsor, Fidelity Charitable® has a national network of philanthropic experts available to present on a variety of charitable topics. We provide unique insight into what's working across the industry and how to incorporate best practices to keep your firm on the leading edge.

Review these program offerings with your firm's needs and target audiences in mind. Your Charitable Planning Consultant is available to discuss these options in detail and how we can support your firm with anything from business development to continuing education and more.

Presentations are designed for the listed audience but can be tailored for the perspective of financial advisors, family offices, attorneys, CPAs or clients. Session length can be customized from 20-50 minutes, but keep in mind continuing education (CE) credit requires at least 50 minutes of instruction.

We are here to help and committed to delivering value to your practice.

Available Sessions

Click each session title to view further details.

Available Sessions	Audience	Level	CE Credit <small>(CFP, CIMA & CPWA)</small>
Tax-Smart Planning			
Charitable Planning Essentials to Grow Your Business	Advisor	Overview	✓
Beyond Cash: Planning Strategies for Complex Charitable Contributions	Advisor	Intermediate	✓
Tax Planning: Helping Clients Maximize Benefits of Charitable Giving	Advisor	Intermediate	✓
Choosing Your Philanthropic Path: Private Foundations & Donor-Advised Funds	Advisor / Donor	Intermediate	✓
A Smarter Way to Give	Donor	Overview	
Market & Giving Outlook	Advisor	Intermediate	✓
Equity Compensation Awards and Charitable Giving	Advisor/Donor	Intermediate	✓
Alpha Philanthropy: Philanthropic Strategies for Ultra-High-Net-Worth Clients	Advisor/ Family Office	Advanced	✓
Philanthropy in Action			
Family Engagement & Succession Planning	Advisor	Overview	✓
The Mission-led Advantage	Advisor / Donor	Overview	
Accelerating Relief with Philanthropy	Advisor / Donor	Intermediate	
Impact Investing: More than Returns	Advisor	Overview	✓
Women & Charitable Giving	Advisor	Intermediate	✓
Firm Planning			
Take a Pulse on Your Practice	Advisor	All levels	

Tax-Smart Planning



Session Descriptions

Charitable Planning Essentials to Grow Your Business

A product agnostic, educational session on how to incorporate charitable planning into an advisor's practice in order to deepen engagement with existing clients, attract new clients, and meet the growing client demand for strategic philanthropic solutions.

Level: Overview

Audience: Advisor

Approved for CE credit



Beyond Cash: Planning Strategies for Complex Charitable Contributions

A thought-provoking presentation where attendees learn about the growing trend of contributing complex assets, such as privately-held C-and S-corp stock, limited partnership interests, and certain publicly-traded stock, to public charities. These can often be the most highly appreciated assets in a client's portfolio and contributing them to charity can potentially minimize capital gains exposure.

Level: Intermediate

Audience: Advisor

Approved for CE credit



Tax Planning: Helping Clients Maximize Benefits of Charitable Giving

With everchanging legislation, many taxpayers struggle to fully understand the nuances and their impact on their finances. Help your clients better prepare for their tax situation with these actionable planning ideas that enable smarter giving. This session will help you uncover highly concentrated, low basis assets for charitable giving and identify other planning opportunities to discuss with your clients.

Level: Intermediate

Audience: Advisor

Approved for CE credit



Choosing Your Philanthropic Path: Private Foundations & Donor-Advised Funds

While both private foundations and donor-advised funds enable strategic and tax-effective charitable giving, with differing structures, rules, privacy and flexibility, the two vehicles come with a unique set of advantages and limitations. This session will examine and compare the benefits of donor-advised funds and private foundations, and how they can complement one another.

Level: Intermediate

Audience: Advisor / Donor

Approved for CE credit



Tax-Smart Planning



Session Descriptions

A Smarter Way to Give

Still giving with your checkbook? Instead, consider funding your philanthropy with a more strategic giving vehicle. This session will help you discover the charitable landscape and how donors give today, learn the differences among common giving strategies, and understand how you can maximize impact while minimizing the tax burden. It's a smarter way to give!

Level: Overview

Audience: Donor

Approved for CE credit

Market & Giving Outlook

When forecasting the market, it is crucial to keep an eye on unique uncertainties that may have immediate and long-lasting effects, particularly on charitable giving. Do you have a strategy to help maximize your clients' giving while minimizing their tax exposure? This session will help you understand the current market and related trends, recognize tax-efficient charitable strategies for your clients, and learn best practices to start incorporating charitable planning.

Level: Intermediate

Audience: Advisor

Approved for CE credit



Equity Compensation Awards and Charitable Planning

Equity compensation such as RSUs, RSAs, and stock options can be valuable assets for individuals, but without proper planning they can result in significant tax implications. Stock plan recipients need your help more than ever in identifying strategic planning solutions—such as charitable giving—to maximize the value and tax benefits of their holistic financial plan while enabling them to make a meaningful impact during this unprecedented time. This session provides valuable insights, perspectives and solutions that can help you deliver greater value to your clients.

Level: Intermediate

Audience: Advisor/Donor

Approved for CE credit



Alpha Philanthropy: Philanthropic Strategies for Ultra-High-Net-Worth Clients

As more family offices enhance their direct investing activity, an important opportunity has emerged to link these private investments with their large-scale philanthropy. Private investments can offer the possibility of higher returns, but if subsequent charitable giving is not pursued in the most tax efficient manner, a significant charitable planning opportunity has been missed. By advising clients to contribute the right asset, at the right time, to the right entity, family offices can execute tax-efficient donations that contribute to the realization of alpha and provide more dollars to the charitable causes their clients choose to support.

Level: Advanced

Audience: Advisor/Family Office

Approved for CE credit



Philanthropy in Action



Session Descriptions

Family Engagement & Succession Planning

With an aging demographic and a changing wealth landscape, advisors must build client relationships across generations within a family if they are to protect the legacy of their practice. Philanthropy is well suited to be the catalyst to initiate meaningful dialogue between family members that will also serve to deepen relationships with current and future clients. In this session, you will identify ways to engage and better serve clients and their families with philanthropy.

Level: Overview

Audience: Advisor / Donor

Approved for CE credit



The Mission-led Advantage

Generosity is good at its core, but a bit of research and planning can elevate its impact into something truly remarkable. This session will help donors to establish charitable goals and an action plan to accomplish them. Grantmaking best practices will guide donors in vetting charities and planning transformative gifts for the causes important to them.

Level: Overview

Audience: Advisor / Donor

Approved for CE credit

Accelerating Relief with Philanthropy

From a worldwide pandemic to racial injustice, you and your clients are likely seeking direction in response to the unprecedented challenges we face. This session centers around our three philanthropic focus areas for crisis response: supporting immediate needs, protecting vulnerable populations and sustaining all nonprofits. You will gain strategies and tips for providing effective support to both your clients and your community.

Level: Intermediate

Audience: Advisor / Donor

Approved for CE credit

Impact Investing: More than Returns

Impact investing has altered the notion that advisors should solely seek financial gains for their clients. Impact investing is gaining momentum as investors seek to align their money and values. This session will focus on how advisors can test the waters with impact investing and start to integrate it into their practice—helping clients have a greater impact with their investments and philanthropy. Based on industry research, key insights, and best practices from top advisors, you'll learn the background and trends related to impact investing, identify approaches and case studies to working with clients, and be ready to act with a blueprint for building an impact strategy, best practices, and resources.

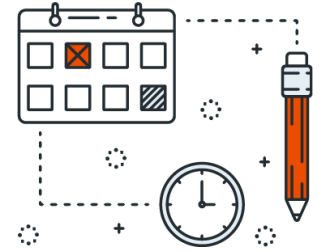
Level: Overview

Audience: Advisor

Approved for CE credit



Philanthropy in Action



Session Descriptions

Women & Charitable Giving

Women today play a central role in philanthropy, leading charitable giving within their families and using their time and skills to advance causes within their communities. This session explores current trends around why and how women give. You will identify the differences and impact of generation and gender on philanthropy and gain best practices for engaging your clients. Additionally, you will discover the intersection of women and impact investing – and how you can help facilitate this type of investing to better serve your clients and grow your practice.

Level: Intermediate

Audience: Advisor

Approved for CE credit



Firm Planning



Session Descriptions

Take a Pulse on Your Practice

Incorporating philanthropy into your firm's holistic wealth management can give your practice a critical competitive advantage. In this session, your charitable planning consultant will walk through a brief assessment aimed at establishing a baseline for how charitable planning is currently integrated at your firm. From there, you will set goals for how you'd like to better serve your clients while also growing your business in the coming year.

Level: All levels

Audience: Advisor

Approved for CE credit



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