



Working with Us Guide

Utilizing our digital capabilities is the most efficient and secure way to conduct transactions on behalf of your client. Our online platform GivingCentral enables professional advisors to open and access a client's Giving Account®, initiate contributions, recommend grants, and much more. This guide walks you through each process step-by-step.

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Opening a Giving Account

IN FIDELITY CHARITABLE'S INVESTMENT POOLS

- 1. Log in to GivingCentral.**
 - Fidelity *Wealthscape*SM Users: Select Fidelity Charitable[®] from the Account or Service menu.
 - All Other Firms: Log in to GivingCentral at FidelityCharitable.org.
- 2. Select "Set Up a Giving Account" from the upper-right corner of your Giving Account List.** After ensuring you have the required information listed under the Investment pools option, select "Set up a Giving Account" to proceed.
- 3. Provide the primary advisor's information.** If you don't see the appropriate contact in the drop-down menu, select "Refer a new advisor" and provide the required information.
 - The primary advisor authorization level is approved by your client after account setup. [Review levels of access](#) to guide their decision making.
- 4. Provide the primary account holder's information.** It is important to have all client information available prior to getting started, as you cannot save mid-process or proceed without completing all required fields.
 - To add additional account holders select "Add another account holder" and complete all required fields.
- 5. Provide account information.** The account name and correspondence name you provide for your client is used for communications by Fidelity Charitable and will be seen by charities when your client recommends a grant (unless anonymity is selected at the time of granting).
 - Your client's Giving Account must be established prior to naming a successor.
- 6. Review all previously entered information for accuracy.** Please retain a copy of this confirmation page if you are required to maintain a record of this account application.
- 7. Submit the request to open a client Giving Account.** Note: Submitting this form includes your acceptance of Fidelity Charitable's Terms and Conditions.
- 8. A Fidelity Charitable Giving Account has been established and is now visible in your Giving Account list with a pending status.**

Frequently Asked Questions

How does my client approve the establishment of their Giving Account?

Your client will receive an email from Fidelity Charitable requesting they verify their personal information, approve the opening of their account and enable any access requests or contributions requested during the account setup process.

My client is unable to access the approval email. How can they approve their account?

If, for any reason, your client cannot access the approval email they can easily access the online approval page by visiting FidelityCharitable.org/approval.

How do I elect successors?

[Successor elections](#) can be made by your client during the account approval process, online after their account is approved, or by a transactional advisor after access is established.

Opening a Giving Account

IN THE CHARITABLE INVESTMENT ADVISOR PROGRAM

**Please note that participation in the Charitable Investment Advisor Program requires firm-level approval from Fidelity Charitable®. To verify your firm's enrollment status please contact our Fundraising Team at 800-262-6039.*

- 1. Log in to [GivingCentral](#).**
 - Fidelity WealthscapeSM Users: Select "Fidelity Charitable" from the Account or Service menu.
 - All other firms: Log in to GivingCentral at [FidelityCharitable.org](#).
- 2. Select "Set Up a Giving Account" from the upper-right corner of your Giving Account list.** After ensuring you have the appropriate requirements listed under the Charitable Investment Advisor Program option, select "Set up a Giving Account enrolled in CIAP" to proceed.
- 3. If you are not the nominated advisor, select the name of the nominated advisor from the relevant drop-down menu.**
- 4. Indicate the investment advisory fee to be assessed to this account.**
 - Any Other Fees? Indicate any other fees to be assessed to this account (e.g., program fees) Please include **all** fees to be deducted from the Giving Account.
- 5. If your firm clears or custodies with Fidelity Investments® and will manage assets on Fidelity WealthScapeSM, provide any relevant G-numbers, select a dividend and capital gains payment method, and proceed to the next step.**
- 6. Provide the primary account holder's information.** Note: The email address provided is utilized for Giving Account approval correspondence.
 - To add additional account holders, select "Add another account holder" and complete all required fields. Up to four account holders are permitted.
- 7. Name your client's Giving Account and provide their correspondence name.** Proceed to the next step.
- 8. Review all previously entered information for accuracy.** Retain a copy of this confirmation page if you are required to maintain a copy of this account application.
- 9. Submit the request to open a client Giving Account.** Note: Submitting this form includes your acceptance of Fidelity Charitable's Terms and Conditions.
- 10. A Fidelity Charitable Giving Account will be established and will be visible in your Giving Account list with a pending status.** Once Fidelity Charitable has reviewed the account opening request, your client will receive an email requesting approval of the Giving Account. Upon your client's approval, the Giving Account is officially open.

Frequently Asked Questions

How does my client approve the establishment of their Giving Account?

After Fidelity Charitable approval, your client will receive an email requesting that they verify their personal information, approve the opening of their account and enable any access requests or contributions requested during the account setup process.

How do I obtain the ability to recommend grants on my client's behalf?

To enable granting authority on an account enrolled in the Charitable Investment Advisor Program, please see our [Agency Agreement](#).

Why am I receiving an error message when attempting to add my client as an account holder?

Fidelity Charitable allows a single account to be established digitally. If your client already has a Giving Account, subsequent applications should be submitted using our [Charitable Investment Advisor Program application](#).

My client is unable to access the approval email. How can they approve their account?

If, for any reason, your client cannot access the approval email they can easily access the [online approval page](#).

How do I elect successors?

[Successor elections](#) can be made by your client during the account approval process, online after their account is approved, or by a transactional advisor after access is established.

Recommending Contributions From a Fidelity® Account

- 1. Log in to GivingCentral.**
 - Fidelity *Wealthscape*SM Users: select “Fidelity Charitable” from the Account or Service menu.
 - All Other Firms: log in to GivingCentral via FidelityCharitable.org.
- 2. Identify the receiving Giving Account by clicking on the appropriate fund name.**
- 3. Select “Contribute” from the Select Action dropdown menu. Read and agree to the required disclosures.**
- 4. Select the donor on whose behalf you are contributing.**
- 5. Identify the contribution type: select “From an eligible Fidelity Brokerage Account,” and choose your preferred view.**
 - Long-Term Appreciated Securities Tool: shows only long-term positions, organized by appreciation from highest to lowest.
 - All Positions: shows the entire brokerage account, including short-term positions/lots.
- 6. Provide the contribution source. Select the brokerage account you are contributing from, then enter the positions and share amounts to be contributed.**
 - Tax lots: If contributing via the “All Positions” view, you may target specific lots by selecting “Enter/Edit Tax Lots,” found below the position details.
- 7. Provide the allocation.**
 - Pools only: indicate how the proceeds of this contribution should be allocated to Fidelity Charitable’s investment pools (whole percentage points only).
 - Charitable Investment Advisor Program: select the appropriate managed account number. If the managed account is custodied at Fidelity, your contribution will be transferred in-kind.
- 8. Review the information provided. If the contributing brokerage account is owned by an Entity, e.g., a trust, please enter the relevant entity details. Review all previously submitted selections for accuracy. When ready, select “Submit.”**
 - Please note: you are executing an irrevocable contribution to Fidelity Charitable.
- 9. Retain a copy of the provided confirmation page for your records. Processing times are generally 3-4 business days, varying by asset type.**

Frequently Asked Questions

Why is the option to contribute not available to me in GivingCentral?

[Request transactional access](#) from your client using the *Access a Giving Account* tool.

What is a Letter of Authorization?

A [Letter of Authorization](#) permits Fidelity Charitable to process contributions from Fidelity brokerage accounts without the written instruction of the contributing donor.

I have transactional access, but I do not see the Fidelity brokerage account I want to contribute from?

You must have AMA 1 or 2 to process a contribution from a Fidelity brokerage account via GivingCentral.

How do I obtain a tax receipt for my contribution?

Confirmations and tax documents are available in *GivingCentral* within the Statements and Confirmations tab.

What happens if I do not target specific tax lots?

Shares will be pulled based on the brokerage account's default disposal method.

I am unable to contribute online. How should I proceed?

Any advisor with AMA 1 or 2 can contribute from a Fidelity account via a Contribution Form or over the phone by contacting our Advisor Experience Team at 800-262-6935.

Recommending Contributions From a Non-Fidelity Account

- 1. Log in to [GivingCentral](#).**
 - Fidelity *Wealthscape*SM Users: select “Fidelity Charitable” from the Account or Service menu.
 - All Other Firms: log in to GivingCentral via FidelityCharitable.org.
- 2. Identify the receiving Giving Account[®] by clicking on the appropriate fund name.**
- 3. Select “Contribute” from the Select Action dropdown menu. Read and agree to the required disclosures.**
- 4. Select the donor on whose behalf you are contributing.**
- 5. Identify the contribution type by selecting “Stocks and Mutual Funds.”**
- 6. Provide delivering firm information. Enter all required information for the delivering firm. Please note that the phone number provided is what we will use if we must contact someone about the contribution.**
- 7. Enter security information. Enter the brokerage account number, security type, ticker symbol and share/dollar amount you wish to contribute. Please note that partial share transfers are not available for stock contributions.**
- 8. Recommend allocation:**
 - Pools only: indicate how the proceeds of this contribution should be allocated in our investment pools (whole percentage points only.)
 - Charitable Investment Advisor Program: select the appropriate managed account number. If the managed account is custodied with Fidelity, your contribution will be transferred in-kind.
- 9. Review all previous selections for accuracy and select “Submit.” Retain a copy of the provided confirmation page for your records.**
 - If you would like Fidelity Charitable to initiate this contribution, please print the generated Letter of Instruction, obtain the signature of a party authorized on the delivering brokerage account, and submit the form to Fidelity Charitable. Additionally, please provide a copy of a recent statement from the account assets are being transferred from.

Frequently Asked Questions

Why is the option to contribute not available to me in GivingCentral?

[Request transactional access](#) from your client using the Access a Giving Account tool.

Where can I find transfer instructions to provide to the delivering firm?

Please see our [Broker-Dealer Instructions](#).

I want Fidelity Charitable to initiate my contribution. Where should I send the LOI?

Please submit your signed Letter of Instruction via GivingCentral's Document Upload tool.

How do I obtain a tax receipt for my contribution?

Confirmations and tax documents are available in GivingCentral within the Statements and Confirmations tab.

Requesting Reallocation/ Pool Exchanges

1. **Log in to [GivingCentral](#).**
 - *Fidelity Wealthscape*SM Users: select “*Fidelity Charitable*” from the Account or Service menu.
 - All Other Firms: log in to GivingCentral via [FidelityCharitable.org](https://www.fidelity.com/charitable).
2. **Identify the recommending Giving Account by clicking on the appropriate fund name.**
3. **Select “*Pool Exchange/Reallocation*” from the Select Action menu.**
4. **Enter the desired pool(s) allocation, in whole percentage points under the “*Recommend*” column. Select “*Next*” to proceed.**
5. **Review the recommended allocation to ensure all information entered is accurate.**
6. **Select “*Submit*” to begin processing your pool exchange. Please save the provided confirmation for your records. Note that pool exchanges submitted after market close will be processed at the close of business the following trading day.**

Frequently Asked Questions

Why am I unable to recommend pool exchanges on my client's behalf?

[Request transactional access](#) using the “Access a Giving Account” tool within GivingCentral.

How often can I rebalance a Giving Account?

Per our [Program Guidelines](#), you may recommend a pool exchange up to five times per calendar month.

How can I transfer funds from the investment pools to another Giving Account?

Please contact our Advisor Experience Team at 800-262-6935 for assistance.

Where can I find more detailed information about Fidelity Charitable's investment options?

View [Pool Performance & Holdings](#).

Utilizing Document Upload

Document Upload enables advisors to digitally upload documents directly to Fidelity Charitable, eliminating the inconvenience of mail or fax, improving security and facilitating faster processing times.

1. Log in to our advisor platform GivingCentral:

- Fidelity WeathscapeSM Users: select “Fidelity Charitable” from the Account or Service menu
- All Other Firms: [Log in to GivingCentral](#)

2. Click the “Document Upload” button in the upper-right corner of the Home Page

3. Enter the Giving Account number, document type, and reference number (if linking to a previous upload)

- Common document types include:
 - Firm: E&O Insurance Certificate, Investment Advisor Firm Agreement, IRS Form W-9
 - Contribution: Irrevocable Contribution Form & LOI, Complex Asset Contribution Form
 - Giving Account Access: Giving Account Access Form, Agency Agreement
 - Giving Account Maintenance: Giving Account Change Form, Letter of Authorization
 - Giving Account Opening: Donor/CIAP/Organizational Giving Account Application

4. Add your file and select upload. If your file is password protected, contact us for assistance. Do not close your browser until the upload is complete. A confirmation screen will confirm submission of the document.

5. Retain the reference number provided for your records.

Frequently Asked Questions

Do I need access to my client's Giving Account in order to upload a document?

No, any professional advisor or member of your firm can utilize GivingCentral and the Document Upload tool.

Can I upload multiple files at the same time?

Each file must be uploaded individually. The reference number generated by the initial upload allows you to link subsequent submissions.

My firm uses Fidelity WeathscapeSM, but I do not see a “Fidelity Charitable” link?

Request Fidelity Charitable entitlements from your Firm Administrator.

Can I recommend a grant on behalf of my client via Document Upload?

Please use the [online grant process](#) to recommend a grant.

Requesting Giving Account Access

- 1. Log in to [GivingCentral](#).**
 - Fidelity *Wealthscape*SM Users: Select “Fidelity Charitable” from the Account or Service menu.
 - All Other Firms: Log in to GivingCentral at [FidelityCharitable.org](https://www.FidelityCharitable.org).
- 2. Select “Access a Giving Account” from the upper-right corner of the Giving Account List.**
- 3. Enter your client’s name and account number then select an access level.**
 - If you do not have your clients account number, select “Don’t have the Giving Account number?” to locate their account using their date of birth and the last four digits of their social security number.
- 4. Select “Request Access” to submit your request.**
- 5. Contact Your Client. Utilize the provided template to notify your client of your pending access attempt; they will be prompted to approve this request upon their next login.**
 - Your pending access is visible in your Giving Account List under Pending Approval.
 - Fidelity Charitable strives to process all requests in a timely manner upon the approval of an account holder.

Frequently Asked Questions

“Access a Giving Account” is not visible to me?

GivingCentral’s access tool is available after obtaining access to at least one Giving Account.

My firm uses Fidelity WealthscapeSM, but I do not see a “Fidelity Charitable” link?

Request Fidelity Charitable entitlements from your Firm Administrator.

I have non-transactional access to my client’s account. How do I update this to transactional?

You can [digitally request transactional access](#) to a Giving Account by initiating a new access request.

How do I remove myself from a Giving Account?

Please contact our Advisor Experience team at 800-262-6935.

Recommending Grants

- 1. Log in to [GivingCentral](#).**
 - Fidelity *Wealthscape*SM Users: Select “Fidelity Charitable” from the Account or Service menu
 - All Other Firms: Log in to GivingCentral at [FidelityCharitable.org](https://www.givingcentral.com/fidelitycharitable.org)
- 2. Identify the recommending Giving Account by clicking on the appropriate fund name.**
- 3. Select “Grant Recommendation” from the Select Action menu.**
- 4. Enter the nonprofit’s name and/or tax identification number in the search bar. Once found, select “Recommend”.**
 - Unable to find the intended organization? Use the “Enter an Organization” option, found to the right of the search bar, to enter the details manually.
- 5. Verify the nonprofit’s legal name and mailing address. The default information is provided by the IRS.**
 - If the grant needs to be delivered to a different address, select “enter a new address”. Providing an alternate address may extend processing times.
- 6. Indicate the purpose of the grant. This designation will be displayed on the letter sent to the organization. Using the “create your own” designation may extended processing times.**
- 7. Specify the desired timing. Grants can be issued as soon as possible, on a future date, or on a recurring basis. Typical processing time is 2-10 business days.**
- 8. Enter the desired dollar amount and select the source of funds. If you are recommending a grant for the full balance of the Giving Account, please contact us.**
- 9. Indicate your client’s acknowledgment preference. Your client can share their name and address, account name only, or remain anonymous. A sample communication is provided for each option.**
- 10. Review the grant recommendation to ensure all information entered is accurate. Agree to the required certifications and submit. Retain the provided confirmation number for your records.**

Frequently Asked Questions

How are grants delivered?

The default delivery method for grant recommendations is first-class mail. Additionally, Fidelity Charitable offers grant delivery via [Electronic Funds Transfer \(EFT\)](#).

I have transactional access to my client’s Giving Account. Why am I unable to recommend grants on their behalf?

An [Agency Agreement](#) is required to obtain granting authority if the Giving Account is enrolled in our Charitable Investment Advisor Program.

How will I know when the nonprofit receives funds?

The Recent Grants tab within the *Giving Account Summary* provides a recommendation’s current status, submission date and [check or EFT] clear date.

Can I enter multiple grant recommendations simultaneously?

Grant recommendations initiated via GivingCentral must be submitted individually. If you need to submit 20 or more grant recommendations, please contact us.

Utilizing Forms & Documents

Fidelity Charitable accepts both physical and electronic signatures on all Fidelity Charitable forms and documents. In the interest of safeguarding the security of all Fidelity Charitable donors and business partners, Fidelity Charitable requires that any document submitted for processing meets the following criteria:

Physical Signature Policy

1. **The document is clearly executed via hand-written signature.**
2. **The signature is dated within 60 days of the date of submission.**
3. **Fidelity Charitable is provided the original document or a high-quality scanned copy.**

DocuSign Signature Policy

*Please note that DocuSign is the only electronic signature vendor accepted by Fidelity Charitable.

1. **The signature is verified with “Email + 1” authentication:**
 - The document is delivered to the signor’s email address on file for the Fidelity Charitable® Giving Account®. In the event you are using DocuSign to open an account, please deliver the document to the email address noted on the application.
 - At least one authenticator is used in the DocuSign envelope. Acceptable authenticators currently include Access Codes, Knowledge-Based, Phone Authorization and SMS Authentication. Note: If using an authentication method other than Knowledge-Based, the verifier, such as phone number or email, must match Fidelity Charitable records.
2. **The DocuSign Envelope ID is visible on each page of the executed document.**
3. **The DocuSign Certificate of Completion, i.e., the Summary Page, is provided with the executed document.**
4. **Signatures are valid for 60 days.**

Frequently Asked Questions

Where can I find a library of Fidelity Charitable Forms?

While we strongly encourage going digital via [GivingCentral](#), you may find forms [on our website](#).

What is the best way to submit forms to Fidelity Charitable?

If your client or firm requires a paper form, please submit it using our [DocUpload tool](#).

Does Fidelity Charitable offer DocuSign?

Fidelity Charitable does not offer DocuSign as a service. Account holders and/or advisors can use their internal DocuSign and/or a third party’s license.

Do Advisors or Account Interested Parties need to follow the authentication policy outlined above?

Yes. Any individual submitting a document to Fidelity Charitable must comply with the signature acceptance policy as described herein.

For information on our policies, please review our [Program Guidelines](#).

Further questions? Please contact our Advisor Experience Team at **800-262-6935**. Our hours of operation are 8:30 a.m. - 6:30 p.m. ET.



Fidelity Charitable is the brand name for the Fidelity Investments® Charitable Gift Fund, an independent public charity with a donor-advised fund program. Various Fidelity companies provide services to Fidelity Charitable. The Fidelity Charitable name and logo and Fidelity are registered service marks of FMR LLC, used by Fidelity Charitable under license. Giving Account® is a registered service mark of the Fidelity Investments Charitable Gift Fund. 1020661.3.0