

## Language to use for IRAs, 401(k)s, and other Qualified Plans

- **Beneficiary Designation where Giving Account at Gift Fund Established Prior to Death\*:**

I distribute \_\_\_\_\_ dollars (\$ \_\_\_\_\_)[and/or \_\_\_\_\_ percent ( \_\_\_\_\_ %)] to the *FIDELITY INVESTMENTS* CHARITABLE GIFT FUND to be allocated to the \_\_\_\_\_ [Giving Account Name], Giving Account Number \_\_\_\_\_.

- **Beneficiary Designation where Giving Account at Gift Fund is Not Established Prior to Death\*:**

I distribute \_\_\_\_\_ dollars (\$ \_\_\_\_\_) [and/or \_\_\_\_\_ percent ( \_\_\_\_\_ %)] to *FIDELITY INVESTMENTS* CHARITABLE GIFT FUND, to be held in a donor advised fund known as the \_\_\_\_\_ [Giving Account Name]. I hereby name \_\_\_\_\_ to take all steps necessary to establish such a donor advised fund at the *FIDELITY INVESTMENTS* CHARITABLE GIFT FUND. I direct \_\_\_\_\_ to have the same recommendation privileges, including those with respect to distributions and investments, which I would have had as an Account Holder at the Gift Fund during my lifetime (with the same authority to designate a successor).

\* The designation of a charitable beneficiary or the designation of both a charitable beneficiary and a non-charitable beneficiary of an undivided IRA may limit the payout options available to the donor and/or the non-charitable beneficiary.

Information provided is general and educational in nature. It is not intended to be, and should not be construed as, legal advice. The Gift Fund does not provide legal advice. Rules and regulations regarding wills and trusts vary at the state level, and laws of a specific state or laws relevant to a particular situation may affect the applicability, accuracy, or completeness of the information provided. Consult an attorney regarding your specific situation.