

# Contribution Form and Letter of Instruction

Use this form to make contributions to a Fidelity Charitable® Giving Account®. If you prefer to make your contribution online, visit [FidelityCharitable.org](http://FidelityCharitable.org).

Print clearly in CAPITAL letters and black ink. If you need more room for information or signatures, make a copy of the relevant page.

Check all boxes below that apply to the type of contribution being made and complete all applicable sections indicated.

- Assets from a Fidelity Investments Brokerage Account: Complete Sections 1, 2, 5, and 7.
- Assets from an account at a financial institution other than Fidelity: Complete Sections 1, 5, 6, and 7.
- Cash Equivalents (check or wire transfer): Complete Sections 1, 3, 5, and 7.
- Stock Certificates Held in Personal Possession: Complete Sections 1, 4, 5, and 7.
- Contribute Restricted Stock, Shares Held at the Company/Transfer Agent, Private Placements, Stock from Dividend Reinvestment Plans (DRIPs), Real Estate, or Bitcoin. Call Fidelity Charitable at 800-952-4438 for instructions.

## 1. Account Holder or Third-Party Contributor

Who is making this contribution to Fidelity Charitable®? The information provided will be used to generate a tax receipt to the person or entity making the contribution.

- Primary Account Holder    Additional Account Holder    Third-Party Contributor

Check one.  
Phone numbers are for questions about this request only; they will not update your Fidelity Charitable contact information.

Provide the address used for tax reporting. Cannot be a P.O. Box or c/o.

Third-party contributors ONLY

First Name	M.I.	Last Name	Giving Account Number
Evening Phone		Daytime Phone	
Extension			
Address			
City	State/Province	ZIP/Postal Code	Country
Social Security or Tax Identification Number		Check one. <input type="checkbox"/> U.S. citizen <input type="checkbox"/> U.S. resident alien	

## 2. Assets from a Fidelity Investments Account

Complete the applicable section below. If your employer matches charitable contributions to charities with donor-advised fund programs, please include the appropriate company paperwork. *NOTE: Securities held for one year or less are generally deductible at the lesser of cost basis or fair market value.<sup>1</sup>*

Enter specific share identification, if applicable. If you do not specify tax lots, contributions will be processed using the account's default disposal method.

Contribute the following cash, stocks, securities, or mutual funds held at Fidelity. *Note: All trades are transacted in shares. Partial shares for stocks cannot be contributed unless the entire position is being contributed.*

Description of Assets (If cash, indicate exact dollar amount)	Symbol if known	Fidelity Account Number
Number of Shares	Lot Acquisition Date <i>Optional</i> MM DD YYYY	Lot Acquisition Cost <i>Optional</i>
		\$ .

  

Description of Assets (If cash, indicate exact dollar amount)	Symbol if known	Fidelity Account Number
Number of Shares	Lot Acquisition Date <i>Optional</i> MM DD YYYY	Lot Acquisition Cost <i>Optional</i>
		\$ .

By signing this form, I hereby authorize National Financial Services LLC and Fidelity Brokerage Services LLC ("Fidelity") to act on instructions directly from National Charitable Services Corp. on my behalf to transfer my contributed asset(s) indicated on this form from my nonretirement brokerage Fidelity Account® to Fidelity Charitable without requiring additional instructions. I fully acknowledge and understand that I am giving up all rights, claims, ownership, and entitlement to the asset(s) once they have been transferred from my Fidelity Account®. *Note: This is a one-time authorization.*

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### 3. Via Check or Wire

Fidelity Charitable will not accept contributions of currency or certain cash-like monetary instruments, including cashier's checks, treasurer's checks, bank checks, official checks, bank drafts, traveler's checks, or money orders.

Check Amount \$	Make checks payable to Fidelity Charitable and reference the Giving Account® number or name in the memo section.
Wire Amount \$	Bank Name

Wire to: JPMorgan Chase Bank, New York, NY, ABA Number: 021000021 For credit to: National Financial Services LLC, Account: 066196-221. For benefit of: Fidelity Charitable, Z97-000442. For further credit to: Name and Giving Account Number (if known). **Fidelity Charitable will not initiate this wire transfer.**

### 4. Stock Certificates Held in Personal Possession

Contribute the following stock certificates. Note: Endorse certificate(s) by writing "National Financial Services LLC," between the words "appoint" and "attorney" in the space provided on the back of each certificate. **Date and Sign** the certificate exactly as your name(s) appears on the front. Mail certificate along with this form via registered mail.

Name of Stock	Number of Shares
Name of Stock	Number of Shares

### 5. Investment Pool Selection

Recommend how to allocate your contribution. If you do not make a recommendation for an initial contribution, your contribution will be allocated to the Money Market Pool. If you do not make a recommendation for an additional contribution, your contribution will be allocated proportionately to reflect the pool allocation of your Giving Account's current balance. If your account balance is \$0 and you do not make a recommendation for the additional contribution, the proceeds from your contribution will be allocated to the Money Market Pool. Please review the pool descriptions before making your recommendation. Pool descriptions are available at [FidelityCharitable.org](http://FidelityCharitable.org) or by calling us at 800-952-4438.

- Check one.  Allocate this contribution in the same percentages as my current Giving Account balance.  
 OR  
 Allocate this contribution as follows:

Choose from option 1, 2, 3, or a combination of the three. The combined total must equal 100%.

Option 1: Charitable Legacy Pool	Percentage of total	Option 3: Single Asset Class Pools	Percentage of total
For donors with Giving Account balances of \$50,000 or more looking to implement a long-term strategy.		For donors who want to build a custom strategy combining pools with specific investment objectives for Giving Account balances.	
<input type="checkbox"/> Charitable Legacy		<b>Domestic Stock</b>	
<input type="checkbox"/> Aggressive Growth (85% Equity)		<input type="checkbox"/> U.S. Equity	
<input type="checkbox"/> Growth (70% Equity)		<input type="checkbox"/> U.S. Equity Access	
<input type="checkbox"/> Moderate Growth (60% Equity)		<input type="checkbox"/> Impact Investing	
<input type="checkbox"/> Balanced (50% Equity)		<input type="checkbox"/> Total Market Index	
<input type="checkbox"/> Moderate Income (40% Equity)		<b>Foreign Stock</b>	
<input type="checkbox"/> Income (30% Equity)		<input type="checkbox"/> International Equity	
<input type="checkbox"/> Conservative Income (20% Equity)		<input type="checkbox"/> International Equity Access	
		<input type="checkbox"/> International Index	
		<b>Bond</b>	
		<input type="checkbox"/> Fixed Income	
		<input type="checkbox"/> Fixed Income Access	
		<input type="checkbox"/> U.S. Bond Index	
		<input type="checkbox"/> Short-Term Fixed Income Access	
		<b>Money Market</b>	
		<input type="checkbox"/> Money Market	

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# LETTER OF INSTRUCTION

## 6. Contribute Securities or Mutual Funds\* Held at a Financial Institution Other than Fidelity

Select only one method that will initiate the transfer of assets, and follow the applicable instructions.

\*Note: If you are transferring mutual funds, please select option 2. Fidelity Charitable must initiate the transfer of mutual funds on your behalf.

Depending on the type of securities and how quickly the securities are transferred by the financial institution currently holding your investments, a typical transfer initiated by Fidelity Charitable will take approximate three weeks to complete.

Note: By providing your Advisor's name and phone number, you are authorizing Fidelity Charitable to release information regarding this transfer to your Advisor for the purpose of completing the transfer.

Enter specific share identification, if applicable.

Note: Securities held for one year or less are generally deductible at the lesser of cost basis or fair market value.<sup>1</sup>

- I will initiate the transfer of assets by completing the following three steps:
- 1) Contact financial institution directly to obtain required procedures and forms, and provide it with the delivery instructions in Section 7: Deliver to DTC Clearing 226.
  - 2) Complete a separate form for each transfer from separate financial institutions.
  - 3) Complete and fax this form to Fidelity Charitable: 877-665-4274.

- OR  I authorize Fidelity Charitable to initiate the transfer of assets by completing the following three steps:
- 1) Update the information required to complete this form.
  - 2) Fax this signed form to Fidelity Charitable: 877-665-4274.
  - 3) Include a copy of most recent statement showing the assets that will be transferred.

TO:

Fidelity Charitable® Giving Account® Number
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FROM:

Delivering Firm Name		Broker Name <i>If applicable</i>	
Date <i>MM DD YYYY</i>	Daytime Phone	Extension	
Address			
City	State	ZIP	
Account Number at Delivering Firm			

TRANSFER:

Number of Shares	Approx. Dollar Amount <i>if known</i>	OF	Description of Assets/Name of Security
Lot Acquisition Date <i>Optional MM DD YYYY</i>	Lot Acquisition Cost <i>Optional</i>		Symbol <i>if known</i>
Number of Shares	Approx. Dollar Amount <i>if known</i>	OF	Description of Assets/Name of Security
Lot Acquisition Date <i>Optional MM DD YYYY</i>	Lot Acquisition Cost <i>Optional</i>		Symbol <i>if known</i>

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## 7. Signatures and Dates

By signing below, you:

- Acknowledge that you have read the current *Fidelity Charitable Policy Guidelines: Program Circular* and agree to its terms and/or conditions described therein.
- Understand that any contribution, once accepted by the Trustees, represents an irrevocable contribution to Fidelity Charitable and is not refundable.
- Acknowledge that you did not receive goods or services in exchange for, or in consideration of, this contribution.
- Understand that, if you are a third-party contributor, you may be eligible for a tax deduction, but you will not obtain any Giving Account advisory privileges.
- Certify that to the best of your knowledge, all information presented in connection with this form is accurate.

Account Holder Name or Third-Party Contributor Name	
Date MM DD YYYY	
<b>DATE</b>	▶
Signature	
<b>SIGN</b>	▶

**AUTHORIZED FOR FIDELITY USE ONLY**  
 ▼ **MEDALLION SIGNATURE GUARANTEE** ▼

Additional Signatory Name (if dual signatures are required by firm)	
Date MM DD YYYY	
<b>DATE</b>	▶
Signature	
<b>SIGN</b>	▶

**AUTHORIZED FOR FIDELITY USE ONLY**  
 ▼ **MEDALLION SIGNATURE GUARANTEE** ▼

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## Delivery Options

Mail this form to Fidelity Charitable:

**Regular mail**

Fidelity Charitable  
P.O. Box 770001  
Cincinnati, OH 45277-0053

**Overnight mail**

Fidelity Charitable  
100 Crosby Parkway KC1D-FCS  
Covington, KY 41015-9325

OR

Fax the form to Fidelity Charitable:

877-665-4274

**If the delivering broker requires an original signature, you must mail the form to Fidelity Charitable. We cannot accept an original signature via fax.**

**Note to Broker-Dealers:** For delivery instructions, visit [www.fidelitycharitable.org/docs/broker-dealer-instructions.pdf](http://www.fidelitycharitable.org/docs/broker-dealer-instructions.pdf).

Delivery instructions for contributing assets held outside Fidelity Investments

**DTC-Eligible Securities**

Deliver to DTC Clearing 226  
Account Number: Z97-000442  
FBO: Fidelity Charitable Giving Account Number: \_\_\_\_\_

**Wire Instructions**

Wire to: JPMorgan Chase Bank, New York, NY  
ABA Number: 021000021  
For credit to: National Financial Services LLC, Account: 066196-221  
FBO: Fidelity Charitable, Z97-000442  
Fidelity Charitable Giving Account Number: \_\_\_\_\_  
*Please note: Fidelity Charitable will not initiate wire transfers.*

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<sup>1</sup>Information provided is general and educational in nature. It is not intended to be, and should not be construed as, legal or tax advice. Fidelity Charitable does not provide legal or tax advice. Content provided relates to taxation at the federal level only. Availability of certain federal income tax deductions may depend on whether you itemize deductions. Rules and regulations regarding tax deductions for charitable giving 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. Charitable contributions of capital gain property held for more than one year are usually deductible at fair market value. Deductions for capital gain property held for one year or less are usually limited to cost basis. Consult an attorney or tax advisor regarding your specific legal or tax situation.

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