

Electronic Funds Transfer Registration Form

Use this form to provide or update your charity's contact information or bank information to receive your grants by electronic funds transfer (EFT). Print clearly in CAPITAL letters and black ink. Need more room? Use a copy of the relevant page or attach a separate sheet. Complete this form only if you are an IRS-qualified public charity.* All fields marked with an asterisk (*) are required fields.

This form supersedes any previous version or prior instructions provided to Fidelity Charitable*. Please fill out this form as completely as possible. Please note that you will need to return the form with a voided check, which is required to sign up for EFT.

1. Charity Information†

Organization's Official Name*	Employer Identification Number (EIN)*
	-

Organization's Legal Address†

Provide the address used for tax reporting. Cannot be a PO box, mail drop, or c/o due to Customer Identification Program bank standards.

Address*			
City*	State/Province*	ZIP/Postal Code*	Country*

*Used for verification of public charity status.

2. Financial Institution Information

Complete this section to tell us where the funds should be transferred. This must be a U.S. bank account.

Financial Institution Name		Telephone Number
Address		
City	State/Province	ZIP/Postal Code

Complete the information below and **enclose a voided check** when you return the registration form.

JOHN SMITH
180 Main Street
Anytown, MA 01234

Date 9/8/7

Pay to the order of \$

Amount 4,100.14 Dollars

AnyBank USA

Memo

011234567 94100145000987

Nine-Digit Bank Routing Number Account Number (up to 17 digits)

A VOIDED CHECK IS REQUIRED TO SIGN UP FOR EFT.

Check one. ☐ Checking Account ☐ Savings Account

Nine-Digit Bank Routing Number	Depositor Account Number

Continues on next page. ►►

3. Charity Contact Information

Complete this section to tell us who at your organization is responsible for managing the bank account to receive the direct deposit. All fields in this section are required due to the necessity of emailing the encrypted Grant Details Report.

Contact Name*		
Title*	Daytime Phone*	Extension
Email Address*		

4. Additional Contacts at the Charity

List up to four additional contacts at your organization who should receive the Grant Details Report in addition to the charity contact listed in Section 3.²

First Name	Last Name	Title	Email Address
First Name	Last Name	Title	Email Address
First Name	Last Name	Title	Email Address
First Name	Last Name	Title	Email Address

5. Signature

By signing below you, an authorized representative acting on behalf of the above-named charity, agree to the following information: (i) your organization is an IRS-qualified public charity in good standing and as described in Internal Revenue Code (IRC) Section 501(c)(3) and 509(a)(1), (a)(2), or (a)(3), or is a private operating foundation as described in IRC Section 4942(j)(3), and applicable regulations and IRS authority; (ii) any grants received from Fidelity Charitable® will be used exclusively in furtherance of your organization's tax-exempt charitable mission; (iii) neither the recommending Fidelity Charitable donor nor another third party will receive goods, services, or any more than incidental benefits (such as tuition, memberships, dues, or athletic funds with more than incidental benefits, raffle tickets, admission to events or goods or services bought at auction) as a result of any grant; (iv) grants will not be used by your organization to satisfy all or a portion of a financial obligation, including an enforceable pledge or any individual or entity; and (v) grants will not be used for lobbying or political contributions or to support political campaign activities.

Name*	
Title*	
Signature*	Date* MM DD YYYY
SIGN ▶	▶

E-Signature is not acceptable.
Wet signature is required.

Did you sign the form and attach any necessary documents?

Send form and any attachments to Fidelity Charitable®.

Questions? Email EFTFidelityCharitable@fmr.com.

Regular Mail

Fidelity Charitable
PO Box 770001
Cincinnati, OH 45277-0001
OR

Fax the form to: 877-665-4274

Overnight Mail

Fidelity Charitable
100 Crosby Parkway
Mail Zone KC1D-FCS
Covington, KY 41015-4325

¹Grants can only be made to IRS-qualified public charities. These are organizations that are described in Section 501(c)(3) and 509(a)(1), (a)(2), or (a)(3) of the Code and applicable regulations and IRS authority, or are private operating foundations as described in Section 4942(j)(3) of the Code and applicable regulations and IRS authority.

²Each EFT is comprised of one or more donor-recommended grants. For EFT, Fidelity Charitable will email the individuals included in Sections 3 & 4 of this form a Grant Details Report that includes a list of each grant included in the EFT sum. The Grant Details Report includes: grant amount, grant acknowledgement information, and the donor-recommended grant purpose.

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.

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