FIDELITY Charitable®
Make more of a difference

Fidelity Charitable®
Firm Administrator User Guide

Firm Administrator User Guide Contents

Registering with Fidelity Charitable

Which best describes you	What you need to do
Your firm wants to manage employee access for client Giving Accounts and GivingCentral®	Your firm should register with Fidelity Charitable. A firm officer or principal can register online or using the Firm Access Form. When registering you will be asked to set up Firm Administrator(s) who will be able to use our online Firm Administrator tool to register employees and manage their access. Click here to identify the individual(s) at your firm who might best serve as a Firm Administrator based on your firm structure.
You are the only person who needs access to client Giving Accounts	You should register online. This will give you immediate access to GivingCentral where you can set up and manage client Giving Accounts.
Your firm uses Fidelity WealthCentral®	Select Fidelity Charitable from the Service menu on WealthCentral. This will take you directly into GivingCentral. If Fidelity Charitable is not on the Service Menu, your Firm Administrator can make this link appear and set your level of access using the User ID Maintenance tool. They should select: – WC CGF ***and*** – WC CGF View & Transact (transactional access) ***or*** CGF View & Set Up (non-transactional access) If your Firm Administrator cannot see the Fidelity Charitable entitlements in the WealthCentral User ID Maintenance tool, they must submit the Additional Entitlements Form to IWS. They can find the form in the WealthCentral forms library located on the Service menu. If you do not know who your Firm Administrator is, please call your IWS service contact.

Getting and Managing Giving Account® Access

How can my firm obtain access to client Giving Accounts?	Your clients can provide Giving Account access using the Giving Account Access Form. Giving Account access is also included in the online Giving Account set up process on GivingCentral. It is our practice to allow the advisor listed on the Giving Account Access Form, as well as that advisor's firm, access to the Giving Account. The Firm Administrator will determine which employees should have access. If your firm uses WealthCentral, a G Number must be associated with the Giving Account in order to provide employee access.
How can my firm limit employee access to Giving Accounts the firm has access to?	A Firm Administrator can use the online Firm Administrator tool to create **Giving Account Groups** and limit employee access. To set up a Giving Account Group the Firm Administrator must provide the name of the Giving Account Group*, the Giving Accounts that should be included in the group, and the firm employees who should have access to this group. Additionally, the Firm Administrator can determine the level of access an employee will be provided (Non-Transactional or Transactional). * Examples of Giving Account Groups are: **Boston-area Clients** or **Advisor A's Clients.**

FIDELITY Charitable®
Make more of a difference

Selecting a Firm Administrator

Overview

A Firm Administrator is responsible for providing employees with access to client Giving Accounts and registering employees with Fidelity Charitable so they can utilize GivingCentral. The Firm Administrator also must notify Fidelity Charitable when an employee has left the firm or is no longer authorized by the firm to access a Giving Account.

The Firm Administrator must have the resources to serve in this role. Here are few key questions to help identify the appropriate individual(s):

1. **Is your firm in a single location?**
2. **Does your firm operate in multiple locations?**
3. **Are you a branch/subsidiary OR do you market yourself under a different name?**

Single Location: The Firm Administrator should be the individual who has the necessary information to determine employee access at your firm.

Multiple Locations: Consider setting up a Firm Administrator for each location. If your firm has a centralized operations team you may want one Firm Administrator. This person must have the employee information required to assign access to client accounts *and* alert Fidelity Charitable when an employee has left the firm.

Branch or Subsidiary: If you want to manage access within your branch/subsidiary, select a Firm Administrator at your branch/subsidiary location. Please register using the broker dealer firm name followed by the branch or subsidiary's marketing name*.

* Example: Firm X – ABC Financial Group

Using the Firm Administration Tool on GivingCentral

Our online tool enables a Firm Administrator to more efficiently and effectively manage firm access in a real time, paperless process.

- If you have been registered as a Firm Administrator you will see the tool when you log in to GivingCentral. The Firm Administration tool will allow you to:
  1. Register employees
  2. Manage registered employees at the firm
  3. Assign and remove employee Giving Account access
  4. View client Giving Accounts that have given your firm access
  5. Manage and create account groups

Please Note: IWS WealthCentral users will continue to manage access using the WealthCentral User ID Maintenance Tool.

FIDELITY Charitable®
Make more of a difference

Firm Administration Tool
Navigation

A Firm Administrator will see the **Firm Administration** tab on GivingCentral

Giving Account List | **Firm Administration** | Your Profile

Firm Employees | Client Giving Accounts | Giving Account Groups

Firm Employees
- View a list of GivingCentral registered employees
- Delete employees
- Register new employees
- Confirm self-registered employees
- Modify employee contact information
- Provide employees with Giving Account access

Client Giving Accounts
- View a list of Giving Accounts to which the firm has access
- Add or remove the Giving Account from Giving Account Groups

Giving Account Groups
- View Giving Account Groups at the firm
- Create Giving Account Groups
- Delete Giving Account Groups
- Rename or change the Giving Accounts within a Giving Account Group

Firm Administration Tool
1. Register Employees

Advisory Services Ltd.

GivingCentral®

▶ Set Up a Giving Account

Giving Account List | **Firm Administration** | Your Profile

Firm Employees Client Giving Accounts Giving Account Groups

Firm Employees

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

▶ Register an Employee

Bennett, Henry [Edit]	
All Giving Accounts	Transactional
Hart, Lindsay [Edit]	
Austin Accounts	Transactional
Dallas/Ft Worth Accounts	Non-Transactional
Keller, Gretchen [Edit]	
Boston Metro Accounts	Non-Transactional
Murphy, Jack [Edit]	
Connecticut Accounts	Transactional
New England Accounts	Non-Transactional

- Click on the **Register an Employee** button to add employees at your firm.
- You must provide basic information about the employee, including email address and date of birth.
- The employee will receive an email informing them they have been given access to GivingCentral and asking them to set up a username and password.

FIDELITY Charitable®
Make more of a difference

Firm Administration Tool

1. Register Employees

Register

1 Employee Email
2 Employee Info
3 Validation
4 Acknowledgments
5 Confirmation

Register a Firm Employee

Confirmation

Thank you for registering a new employee with Fidelity Charitable. Your colleague will soon receive an email with instructions on how to set up a Username and Password.

Please go to the Firm Administration section to provide this employee with Giving Account access.

Learn more about providing employees with Giving Account access

Employee Information

Prefix:	
First Name:	Lindsay
Middle Name:	
Last Name:	Hart
Suffix:	
Birthday (mm/dd):	12/06
Title / Role:	Advisor
Email Address:	Lindsay@advisorsvcs.com
Fidelity AdvisorCHANNEL User:	No
Phone Number:	512-288-0530
Mailing Address:	18194 Corte Vista

Give This Employee Access
Register Another Employee
Go to Firm Administration

- Once the employee is registered you can provide them with access to client Giving Accounts by selecting the **Give This Employee Access** button.

FIDELITY Charitable®
Make more of a difference

Firm Administration Tool
1. Register Employees

- If an advisor has registered for GivingCentral and appears to work at your firm the table below will appear in the Firm Employees section of the Firm Administration tool. You will also receive an email alerting you to log into GivingCentral to confirm or remove the person.

UNCONFIRMED EMPLOYEES

Unconfirmed employees have registered themselves for GivingCentral. Please confirm you will manage their access (or remove them) below.

Employee Name	Email Address	Mailing Address	Confirm and Manage Access	Remove
Bennett, Henry	Lindsay@advisorsvcs.com	2200 45th Street Austin, TX 78730	Confirm Employee	✖

Confirming the employee means that this person works at your firm and you will manage their access to client Giving Accounts. This employee will now display on the Firm Employees list.

Removing the employee means this person does not work at your firm. Once removed they will no longer display in your Firm Administrator tool.

Firm Administration Tool
2. Manage Registered Employees at the Firm

Advisory Services Ltd.

GivingCentral®

▶ Set Up a Giving Account

Giving Account List | **Firm Administration** | Your Profile

Firm Employees | Client Giving Accounts | Giving Account Groups

Firm Employees

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

▶ Register an Employee

Bennett, Henry [Edit]	
All Giving Accounts	Non-Transactional
Bergen, Scott [Edit]	
No Access	
Hart, Lindsay [Edit]	
Austin Accounts	Transactional
Dallas/Ft Worth Accounts	Non-Transactional
Keller, Gretchen [Edit]	
Boston Metro Accounts	Non-Transactional
Murphy, Jack [Edit]	
Connecticut Accounts	Transactional
New England Accounts	Non-Transactional

- The Firm Employees section lists all advisors registered at your firm and provides a summary of their Giving Account access
- You can click the **Edit** link to view/modify information about a specific employee

FIDELITY Charitable®
Make more of a difference

Firm Administration Tool
2. Manage Registered Employees at the Firm

Register a Firm Employee

Employee Information

* Required

Prefix:	>>Select a Prefix<<
* First Name:	Lindsay
Middle Name:	
* Last Name:	Hart
Suffix:	>>Select a Suffix<<
* Birthday: (e.g., mm/dd)	12/06
* Title / Role:	Advisor
Fidelity AdvisorCHANNEL User:	☐
* Phone Number: (e.g., 123-123-1234)	512-288-0530 Ext:

☐ Their Mailing Address is the same as my Mailing Address

* Mailing Address:	18194 Corte Vista
* City:	Austin
* State:	Texas
* Zip Code:	78703 -
* Country:	United States

- On the **Edit** screen you can update an employee's information.
- You must delete the employee if they no longer work at your firm. This means they will no longer be able to log in to GivingCentral and will not have access to client Giving Accounts.

Firm Administration Tool

3. Give Employees Access

Firm Employees

Hart, Lindsay

Employee Information [Edit]

Birthday:	11/08
Title / Role:	Advisor
Email Address:	Lindsay@advisorsvcs.com
Phone Number:	214-213-9898
Mailing Address:	200 Seaport Boston, MA 02109

Giving Account Access:	**Access Level:**	
○ All Giving Accounts	○ Transactional	○ Non-Transactional
◉ Giving Account Groups		
☐ Austin Accounts	○ Transactional	○ Non-Transactional
☑ Boston Metro Accounts	○ Transactional	◉ Non-Transactional
☐ Central Texas Accounts	○ Transactional	○ Non-Transactional
☐ Connecticut Accounts	○ Transactional	○ Non-Transactional
☐ Dallas/Ft Worth Accounts	○ Transactional	○ Non-Transactional
☐ New England Accounts	○ Transactional	○ Non-Transactional
○ No Access		

Back SUBMIT

When providing an employee with Giving Account Access you have three options:

1. All Giving Accounts which provides access to all Giving Accounts to which your firm has access
2. Giving Account Groups which your firm has set up to manage employee client Giving Account access (e.g., by region/branch, advisors)
3. No Access which means an employee cannot access client Giving Accounts

---

There are two Giving Account Access levels:

1. Transactional
2. Non-transactional

Please note: Donor permissions on a Giving Account will dictate actual access. Your selection will provide a maximum level of access.

Firm Administration Tool

4. View Giving Accounts that have Given Your Firm Access

GivingCentral®

Giving Account List | **Firm Administration** | Your Profile

Firm Employees | **Client Giving Accounts** | Giving Account Groups

Client Giving Accounts

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Mulvihill, Clare [Edit]

Giving Account Name:	Mulvihill JC Account
Giving Account Number:	1040554
Giving Account Type:	General
Firm Access Level:	Transactional
Giving Account Groups:	All Giving Accounts
	Connecticut Accounts
	New England Accounts

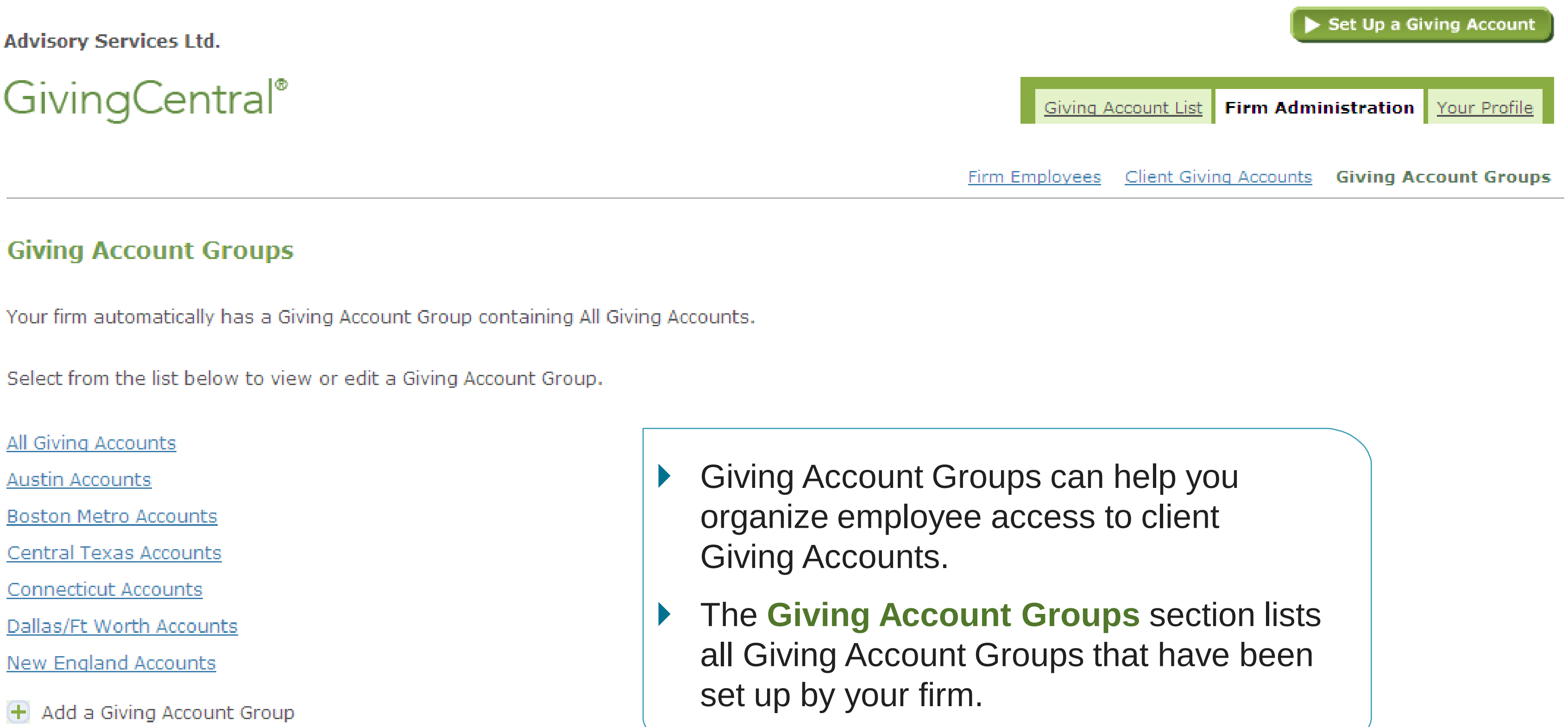
Thomas, John [Edit]

Giving Account Name:	Callahan Giving Fund
Giving Account Number:	1040555
Giving Account Type:	General
Firm Access Level:	Transactional

- The **Client Giving Accounts** section lists all Giving Accounts to which the firm has access
- Clicking on the **Edit** link allows you to add or delete the Giving Account from Giving Account Groups.

Firm Administration Tool

5. Manage and Create Giving Account Groups



- Giving Account Groups can help you organize employee access to client Giving Accounts.
- The **Giving Account Groups** section lists all Giving Account Groups that have been set up by your firm.

Firm Administration Tool
5. Manage and Create Giving Account Groups

Advisory Services Ltd.

GivingCentral®

Set Up a Giving Account

Giving Account List | **Firm Administration** | Your Profile

Firm Employees | Client Giving Accounts | **Giving Account Groups**

Giving Account Groups

New England Accounts | Delete this Giving Account Group

Add/Remove	Client Name	Giving Account Name	Giving Account Number	Giving Account Type
☑	Mulvihill, Clare	Mulvihill JC Account	1040554	General
☑	Thomas, John	Callahan Giving Fund		
☐	Windsor, Alexa	Enfield Charitable Account		

Back | SUBMIT

- Clicking on a Giving Account Group name displays a list of all Giving Accounts included within the group.
- The **Edit** link allows you to edit the Giving Account group name, add/delete accounts in the group, or delete the group entirely.

Firm Administration Tool

5. Manage and Create Giving Account Groups

Advisory Services Ltd.

GivingCentral®

Set Up a Giving Account

Giving Account List | **Firm Administration** | Your Profile

Firm Employees | Client Giving Accounts | **Giving Account Groups**

Giving Account Groups

Your firm automatically has a Giving Account Group containing All Giving Accounts.

Select from the list below to view or edit a Giving Account Group.

All Giving Accounts

Austin Accounts

Boston Metro Accounts

Central Texas Accounts

Connecticut Accounts

Dallas/Ft Worth Accounts

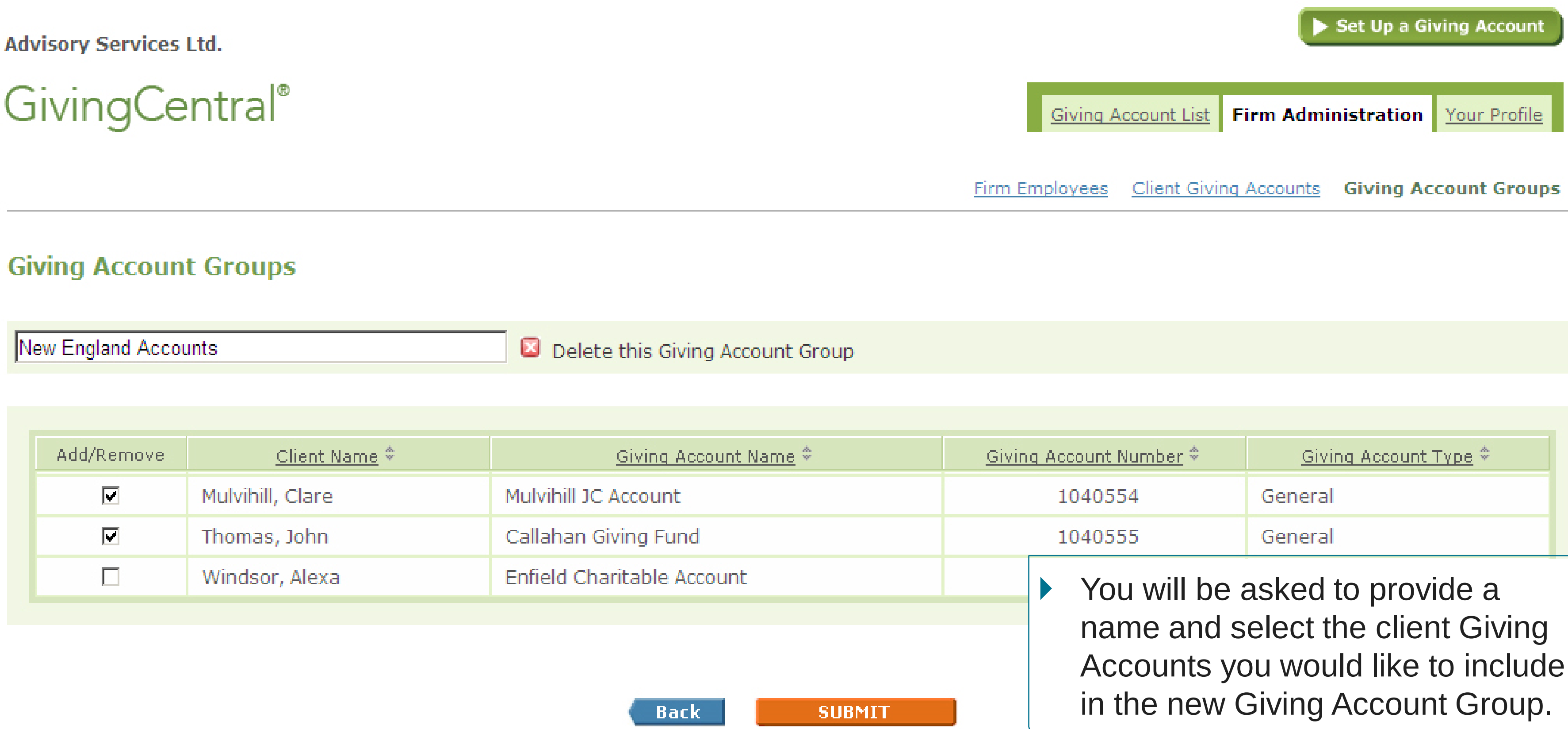
New England Accounts

+ Add a Giving Account Group

- You can create a new Giving Account Group by selecting **Add a Giving Account Group**

FIDELITY Charitable®
Make more of a difference

Firm Administration Tool
5. Manage and Create Giving Account Groups



- You will be asked to provide a name and select the client Giving Accounts you would like to include in the new Giving Account Group.

Disclosure

Fidelity Charitable is the brand name for Fidelity® 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, Fidelity, and GivingCentral are registered service marks, of FMR LLC, used by Fidelity Charitable under license. Giving Account is a registered service mark of the Trustees of Fidelity Charitable.
625635.2.0

FIDELITY Charitable®
Make more of a difference