

Grant Recommendation Form

If you prefer to complete your grant recommendation online, visit FidelityCharitable.org.

For grant recommendation guidelines, refer to the *Fidelity Charitable® Policy Guidelines: Program Circular*. Fidelity Charitable® will not forward any enclosures with grants.

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

1. Giving Account® Name and Number

Giving Account® Name	Giving Account Number

2. Recommended Recipient Charity

Before making your recommendation, please review the certifications in Section 7.

Have you previously recommended a grant to this organization from Fidelity Charitable?

Check one. Yes No

If you are unsure of the organization's official name and/or mailing address, visit FidelityCharitable.org/guidestar.

Fidelity Charitable may contact the recipient charity.

Organization's Official Name		Federal Tax ID Number	
Contact Name		Phone	
Address			
City	State/Province	ZIP/Postal Code	Country

Recommended Purpose

Is there a recommended purpose for this gift? If yes, describe (e.g., annual fund, in memory of, to honor, etc.). If the purpose of your grant is to honor a loved one and you wish to notify the family of the honoree, include the name and address of the person to be notified.

Details

3. Grant Amount *Minimum of \$50*

Grant Amount	Please also write out the amount of the grant.
\$ <input type="text"/>	

4. Indicate Where the Grant Should Come From

Check one box only from Investment Pool Balances or Advisor Managed Charitable Balance.

Investment Pool Balances

Recommend the pool(s) from which this grant should be drawn (in whole dollars). If you do not recommend a pool(s), Fidelity Charitable will disburse funds proportionately from all pools with balances.

- Disburse funds proportionately based on current allocation.
- Disburse funds evenly among current allocation (example: 33%, 33%, 34%).

Other

Advisor Managed Charitable Balance

If you are participating in the Charitable Investment Advisor Program, you may select to have this grant drawn from the advisor managed charitable balance within your Giving Account.

- Allocate funds from advisor managed charitable balance.

Form continues on next page. ▶▶



5. Acknowledgement

Grants to charities are accompanied by a letter that includes the name(s) of the individual(s) recommending the grant so the charity may thank them. Please check only ONE box to indicate who should be acknowledged for the grant.

- Check one. The individual(s) named on the Giving Account The name of the Giving Account only Anonymous
 The following individual(s) in lieu of those named on the Giving Account:

Name(s)			
Address			
City	State/Province	ZIP/Postal Code	Country

6. Timing of Grant

- Check one. As soon as possible Issue this grant on a specific date
 Issue this grant on a scheduled/recurring basis. *The grant amount in Section 3 will be sent for each scheduled occurrence.*

Frequency: Monthly,
 Quarterly, Semiannually,
 or Annually.

Frequency	Start Date MM DD YYYY	End Date MM DD YYYY
<input type="checkbox"/> M <input type="checkbox"/> Q <input type="checkbox"/> S <input type="checkbox"/> A		

Your grant recommendation is nonbinding and is subject to review and approval by Fidelity Charitable. If approved, the grant will generally be made within 10 business days; however, this process may take longer. Confirmation that the grant was approved and sent will be mailed or emailed to the Primary Account Holder once the grant has been issued.

7. Signature

By signing below, you:

- Certify that neither you nor anyone else will receive any impermissible benefit (e.g., tuition, membership fees with more than incidental benefits, dues, admission to charitable or other event, goods bought at auction, etc.) from the recommended charitable organization from this grant, if distributed. Examples of permissible benefits include benefits that are not more than incidental, such as free or discounted admission, free or discounted parking, token logo-bearing key chains, caps, T-shirts, and calendars.
- Certify that this grant will not fulfill all or a portion of a pledge to the charitable organization.
- Acknowledge that this grant does not entitle you or any other person to an income tax charitable deduction, because the donor was eligible to take a deduction at the time of the contribution(s) to Fidelity Charitable. Any tax receipt that may be received from the recommended charity will be disregarded.
- Certify that if the grant you are recommending is for a supporting organization, neither you nor any other Account Holders on the Giving Account, nor any parties related to you or to any other Account Holders on the Giving Account, directly or indirectly control any supported organization of the recommended grant recipient. Supporting organizations are 501(c)(3) public charities that typically carry out one or more functions of their supported public charity (for example, an alumni association that fundraises for a university, or a parent-teacher association that performs certain functions at a school).
- Acknowledge that you have read the Grant Recommendation Guidelines in the current *Fidelity Charitable® Policy Guidelines: Program Circular*.

Account Holder Name	Phone Number
Account Holder Signature	Date MM DD YYYY

Sign the form and send or fax to Fidelity Charitable.

Questions? Go to FidelityCharitable.org or call 1-800-952-4438.

Fax the form to: 1-877-665-4274

Regular mail

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

Overnight mail

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

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