



## 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

|                 |
|-----------------|
| Date MM DD YYYY |
|-----------------|

- 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 a charitable or other event, goods bought at auction) 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 (e.g., 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 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](http://FidelityCharitable.org) or call 800-952-4438.

Fax the form to 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

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. Fidelity Charitable and Fidelity are registered service marks, and the Fidelity Charitable logo is a service mark, of FMR LLC, used by Fidelity Charitable under license. Giving Account is a registered service mark, and the Charitable DonorFlex Program is a service mark, of the Trustees of Fidelity Charitable. 490324.6.0 (08/2017)