

# Grant Recommendation Form

If you prefer to complete your grant recommendation online, visit [FidelityCharitable.org](http://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](http://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). If the purpose of your grant is to honor a loved one and you wish to notify the honoree or their family, 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.
\$	

## 4. Indicate Where the Grant Should Come From

Check one box only  
from Investment Pool  
Balances or Other  
Giving Account  
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

Write in request

### Other Giving Account Balance

If you are participating in the Charitable Investment Advisor Program ("CIAP") or the Charitable DonorFlex Program<sup>SM</sup> ("DonorFlex"), you may recommend to have this grant disbursed from the associated balance within your Giving Account.

- Disburse funds from CIAP balance, subject to available funds.
- Disburse funds from DonorFlex balance, subject to available funds.

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
- |                 |
|-----------------|
| 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
<b>SIGN</b> ▶	▶

<p><b>Sign the form and send or fax to Fidelity Charitable.</b></p> <p><b>Questions?</b> Go to <a href="http://FidelityCharitable.org">FidelityCharitable.org</a> or call 800-952-4438.</p> <p>Fax the form to 877-665-4274.</p>	<p><b>Regular mail</b></p> <p>Fidelity Charitable P.O. Box 770001 Cincinnati, OH 45277-0053</p>	<p><b>Overnight mail</b></p> <p>Fidelity Charitable 100 Crosby Parkway Mail zone KC1D-FCS Covington, KY 41015-9325</p>
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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)

