

Recommend a grant from your Giving Account

Recommending a grant from your Giving Account is easy. If you prefer mail or fax, simply fill out a [Grant Recommendation Form](#) and send it to us.

1 Go to **Grant to charities**

The screenshot shows the Fidelity Charitable website interface. At the top, there are navigation links for Feedback, Contact us, Your profile, and Logout. Below this is a menu with options: Accounts (2), Grant (Support your favorite charities), Contribute (Fund your Giving Account), Invest (Review or update investments), History (Access transaction history & statements), and Guidance (Develop your giving strategy). The main content area displays the account name 'Demo Account Family Charitable Fund' with Giving Account #1053934 and a balance of \$1,100,553.92. It also shows 'Available' funds of \$111,051.08 and 'Pending grants' of \$1,111,605.00. Two buttons are visible: 'Grant to charities' and 'Fund your Giving Account', both with orange arrows pointing to them.

2 Enter grant details – choose from charities you’ve supported in the past or search for new ones. You can add up to 100 grant recommendations at a time.

The screenshot shows the 'Enter grant details' page. On the left, there is a sidebar with a progress indicator showing three steps: '1 > Enter grant details', '2 > Allocate funds', and '3 > Confirm & submit'. The main content area is titled 'Enter grant details' and includes a 'Your grant list: (1)' section showing a grant to 'AMERICAN ASSOCIATION OF ZOOKEEPERS' for \$50.00. Below this is a 'Total' of \$50.00. The 'Your charity list' section shows a search bar and a list of charities, including 'AMERICAN ASSOCIATION OF ZOOKEEPERS' and 'ANILA SINHA FOUNDATION FOR THE PROMOTION ARTS & CULTURE OF INDIA'. The 'AMERICAN ASSOCIATION OF ZOOKEEPERS' entry is selected, and its details are shown in a form on the right, including fields for Amount (\$50.00), Use (Where it's needed most), Acknowledgement (Demo Account Family C...), and Timing (ASAP). A 'Next >' button is visible at the bottom right of the form, with an orange arrow pointing to it.

Click **next** when all details have been added

- 3 Allocate funds – tell us how you would like your grant recommendation funded based on the pool allocation you have selected for your Giving Account.
- 4 Confirm, agree to statements at the bottom of the page and submit your grant recommendation.



Grant recommendations typically take 1-5 business days to be processed and are subject to approval by the Trustees of Fidelity Charitable.



View your grant history to see the details and track the status of your grant recommendations