Manage your Giving Account

Update Account Holder information

Allow another person to be an Account Holder with access to your Giving Account to have the ability to make grant recommendations and recommend reallocation among the investment pools. Or take an Account Holder off the Giving Account.

Change Giving Account name

Grants are accompanied by a letter from Fidelity Charitable that includes the Giving Account name, unless anonymity is specifically requested. You can update your Giving Account name at any time.

Name successors

Be sure to add or update successors as your legacy planning or charitable objectives change. Successors can be individuals, charities or a combination of both.

Update your personal info

Update your personal information as needed, including your address, phone number, email address and delivery preferences.

Reallocate investment pools

Based on your charitable giving objectives, you advise among which investment pools your contributions should be allocated. You can request a reallocation of the investment pools by recommending a pool exchange up to five times per month.

Give someone else access

Let your advisor or another person transact on your behalf or view your Giving Account information.