

# Pooled Income Fund Change Form

Use this form to make changes to your account and to change Donor information (e.g., address, successor options). To change how quarterly payments are received (e.g., direct deposit) please use the Pooled Income Fund Income Beneficiary Direct Deposit and Change Form available at FidelityCharitable.org. Type or print clearly in CAPITAL letters and black ink. If you need more room for information or signatures, use a copy of the relevant page.

## 1. Donor

Phone numbers are for questions about this request only; they will not update your Fidelity Charitable® contact information.

First Name	M.I.	Last Name	Pooled Income Fund Account Number
Evening Phone		Daytime Phone	Extension
Social Security Number <i>Required</i>			

## 2. Remove Your Name as Donor

- Check here to authorize removal of your name as Donor. Please ensure that there is another Donor to assume Pooled Income Fund Account privileges, or add a new Donor in Section 3 below.
- Check here to update current information. Complete the information in Section 3 below.

## 3. Add Donor or Update Information

All Donors named have full and equal privileges to recommend charitable beneficiaries, name Additional Donors, and request information about the account. All account correspondence will be sent to the Primary Donor. Unless named as a Donor, income beneficiaries will only receive information regarding income payments made to them. There can be up to four Donors. Please attach additional sheets, if necessary. **The new Donor must also sign in Section 6 on page 4.**

Social Security number and date of birth are required for new Donors.

First Name	M.I.	Last Name	Social Security Number
Date of Birth <i>MM DD YYYY</i>	Email		
Evening Phone	Daytime Phone	Extension	

### Legal Address

Provide the address used for tax reporting. It cannot be a P.O. Box, mail drop, or c/o.

Address			
City	State/Province	ZIP/Postal Code	Country

### Mailing Address

- Same as legal address

Address			
City	State/Province	ZIP/Postal Code	Country

Add Donor or Update Information continues on next page. ►►



**Citizenship**

Check one.  U.S. citizen  
 U.S. resident alien

**Salutation**

This will appear on Pooled Income Fund Account correspondence and letters that accompany grants, unless anonymity is specifically requested.

Address Salutation <i>e.g., Dr. and Mrs. John Smith, Joan and John Smith</i>
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**Pooled Income Fund Account Name**

Charitable beneficiary distributions are accompanied by a letter that includes the Pooled Income Fund Account name, unless anonymity is specifically requested.

Pooled Income Fund Account Name
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**4. Beneficiary Recommendations**

Upon the death(s) of the income beneficiary(ies), the value of units attributable to your gift to the Pooled Income Fund (PIF) (the "remainder interest") will be distributed to Fidelity Charitable®. You, as the Pooled Income Fund Donor, may at any time during your life choose to recommend that the Pooled Income Fund distribute assets to Fidelity Charitable for immediate grant distributions to other charitable organizations, establish a Giving Account®, or a combination of the two. Total successor allocation among the options must be 100%. If no recommendation is made, upon the death(s) of the income beneficiary(ies), any remainder interest will be distributed to the Fidelity Charitable Trustees' Philanthropy Fund. If you wish to make changes in the future, you may do so by notifying the Pooled Income Fund in writing.

**A. Distribution to Other Charitable Organizations** *Attach additional sheets if more than two*

Pooled Income Fund Donors may recommend that Fidelity Charitable distribute the remainder interest to a maximum of 10 IRS-qualified public charities. Pooled Income Fund Donors may make this recommendation at any time during their lives by completing the section below, signing, and sending this form to the Pooled Income Fund. All recommendations are subject to the review and approval of the Trustees of Fidelity Charitable.

<b>Organization #1</b>		% of PIF Account	
		%	
Organization Name		Federal Tax ID Number	
Special Purpose <i>e.g., in memory of</i>		Phone	

**Mailing Address**

Address			
City	State/Province	ZIP/Postal Code	Country

<b>Organization #2</b>		% of PIF Account	
		%	
Organization Name		Federal Tax ID Number	
Special Purpose <i>e.g., in memory of</i>		Phone	

Beneficiary Recommendations continues on next page. ►►





**Mailing Address**

Address			
City	State/Province	ZIP/Postal Code	Country

**B. Establish a Giving Account at Fidelity Charitable** *Attach additional sheets if more than one*

Complete this section to establish a Giving Account for an individual. PIF Donors may request that Fidelity Charitable establish and maintain a Successor Giving Account with the remainder interest at their death. PIF Donors may name individuals who will assume all Giving Account privileges (such as overseeing contributions and making grant recommendations) upon the death of the last income beneficiary. Your designated Successor may recommend grants to IRS-qualified public charities. Upon the death of the last income beneficiary, Fidelity Charitable will send the individual Successor named below the Fidelity Charitable Program Circular and Donor Application.

Please note that upon the death of the last income beneficiary, any remainder interest is subject to the terms and conditions set forth by Fidelity Charitable.

First Name	M.I.	Last Name	Social Security Number
Date of Birth MM DD YYYY	Email		Relationship to PIF Donor
Evening Phone	Daytime Phone	Extension	

**Legal Address**

Provide the address used for tax reporting. It cannot be a P.O. Box, mail drop, or c/o.

Address			
City	State/Province	ZIP/Postal Code	Country

**Mailing Address**

Same as legal address

Address			
City	State/Province	ZIP/Postal Code	Country

**Citizenship**

Check one.  U.S. citizen  
 U.S. resident alien

**5. Direct Deposit Instructions**

All income beneficiaries may elect to have quarterly income payments direct deposited by completing the Pooled Income Fund Income Beneficiary Direct Deposit and Change Form, available online at FidelityCharitable.org. If you do not wish to establish direct deposit, a check will be mailed to the income beneficiary address of record in Section 4.

Form continues on next page. ►►





# 6. Signature(s)

## Donor Signature

By signing below, you:

- Acknowledge that you have read the current *Pooled Income Fund Disclosure Statement and Declaration of Trust* and agree to its terms and/or conditions described therein.
- Certify that, to the best of your knowledge, all the information presented in connection with this form is accurate.
- Will promptly notify Fidelity Charitable in writing of any changes.
- As required by the Declaration of Trust, the Trustees and you agree that upon termination of the interests of the income

beneficiaries, the units of the Pooled Income Fund representing their interests will be separated from the Pooled Income Fund and transferred to the Trustees of Fidelity Charitable in accordance with the Declaration of Trust. You represent and warrant that the information provided in this form is true and correct and will indemnify the Pooled Income Fund against any losses it may suffer due to any misrepresentations, breach, or failure of such representations.

Donor Name	
Donor Signature	Date MM DD YYYY
<b>SIGN</b> ▶	▶

## New Donor Signature *Any new Donor added in Section 3 must sign here. Attach additional sheets, if necessary.*

By signing below, you:

- Acknowledge that you have read the current *Pooled Income Fund Disclosure Statement and Declaration of Trust* and agree to its terms and/or conditions described therein.
- Certify that, to the best of your knowledge, all the information presented in connection with this form is accurate.
- Will promptly notify Fidelity Charitable in writing of any changes.
- As required by the Declaration of Trust, the Trustees and you agree that upon termination of the interests of the income

beneficiaries, the units of the Pooled Income Fund representing their interests will be separated from the Pooled Income Fund and transferred to the Trustees of Fidelity Charitable in accordance with the Declaration of Trust. You represent and warrant that the information provided in this form is true and correct and will indemnify the Pooled Income Fund against any losses it may suffer due to any misrepresentations, breach, or failure of such representations.

New Donor Name	
New Donor Signature	Date MM DD YYYY
<b>SIGN</b> ▶	▶

Under the policies of Fidelity Charitable, and in accordance with the anti-money laundering regulations applicable to the various financial institutions that provide financial services to Fidelity Charitable, we obtain, record, and may verify information that identifies each person who establishes a Pooled Income Fund Account at Fidelity Charitable Pooled Income Fund and other people who contribute to the Pooled Income Fund or have access to the Pooled Income Fund Account.

Therefore, when you establish a Pooled Income Fund Account, we will ask for the name, address, date of birth, and other information that will allow us to identify people with access to the Pooled Income Fund Account. We may also ask to see individual driver's licenses or other identifying documents, and we may verify the information we obtain.

<p><b>Did you sign the form and attach any necessary documents?</b> Send the form and any attachments to Fidelity Charitable Pooled Income Fund.</p> <p><b>Questions?</b> Go to <a href="http://FidelityCharitable.org">FidelityCharitable.org</a> or call 1-800-952-4438.</p>	<p><b>Regular mail</b> Pooled Income Fund c/o Fidelity Charitable P.O. Box 770001 Cincinnati, OH 45277-0053</p>	<p><b>Overnight mail</b> Pooled Income Fund c/o Fidelity Charitable 100 Crosby Parkway KC1D-FCS Covington, KY 41015-9325</p>
	<p>OR</p> <p>Fax the form to: 1-877-665-4274</p>	

The Pooled Income Fund is a trust maintained by Fidelity Charitable®. Fidelity Charitable is the brand name for Fidelity® Charitable Gift Fund, an independent public charity with a donor-advised fund program. Various Fidelity companies provide services to Fidelity Charitable. The Fidelity Charitable name and logo and Fidelity are registered service marks of FMR LLC, used by Fidelity Charitable under license. Giving Account is a registered service mark of the Trustees of Fidelity Charitable.  
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