

**Problem:** Looking for a tax-effective way to donate to your favorite charity?

**Solution:** Open a Donor Advised Fund through Fidelity

### **Steps to take:**

1. Navigate to [fidelitycharitable.org/open-account.html](https://fidelitycharitable.org/open-account.html)
2. Click "Open Now".
3. Complete all account holder information and click Next.
4. Complete account information and click Next.
5. Confirm and Submit.

### **Benefits:**

- No minimum contribution to open an account
- Long-term appreciating assets can be purchased within the account after the initial deposit. These investments have the ability to grow tax-free in the account, making each donation more meaningful
- All contributions are tax deductible the year they are made (even has the ability to exceed standard deduction)
- No capital gains tax is incurred when funds (stocks) are transferred into the Donor Advised Fund, and the entire value can be used as an itemized deduction on your tax return
- Once the account is funded, contributions can be made at any time, and for any amount
- All donations from your Donor Advised Fund can be automated

**There is NO Charge for us to be the 'advisor' on this account and assist you if you ever need help.**

**To learn more about Endowment Wealth Management  
and our Fee-Only Fiduciary Advice:**

**Call: (920) 785-6010  
Visit: [www.EndowmentWM.com](http://www.EndowmentWM.com)**

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