ENDOWMENT WEALTH MANAGEMENT®
Fee-Only Fiduciary Advisors

EWM Personal Finance
Tips & Solutions

Fidelity Donor-Advised Fund - Client Guide

1. **Logging Into Your Account**
   a. Visit: www.FidelityCharitable.org (not Fidelity Investments).
   b. Click "Log In" at the top right of the page.
   c. Enter your username and password (same as Fidelity Investments).
      i. If this is your first time logging in, click "Register now" and follow the prompts.

2. **Making a Grant (Recommending a Donation)**
   a. Once logged in, navigate to "Grant" in the main menu.
   b. Select "Grant to charities".
   c. Click "Find a charity" to find your desired charity by name, EIN, or location.
   d. Choose the organization and enter:
      i. Grant amount
      ii. Grant purpose (optional)
      iii. Acknowledgement (you can choose to make your grant anonymously)
      iv. Timing (immediate, future, or recurring)

   e. Review and submit your recommendation.

   Fidelity Charitable will verify the charity's eligibility and send the grant on your behalf.

   You'll receive an email confirmation once the grant is approved.

3. **Contributing to your Giving Account (EWM can assist with account administration and coordination)**
   a. Navigate to "Contribute" on the top menu, then "Fund my giving account".
   b. Select your contribution type:
      i. Connect a bank, Fidelity account, or non-Fidelity accounts.
      ii. Follow the prompts to complete the transaction.
      After each contribution, Fidelity Charitable will send a tax receipt(s) for your records.
      Contributions are irrevocable and may qualify for an immediate charitable deduction.

*This material is for informational purposes only and is not intended to provide tax, legal, or accounting advice. Please consult your tax professional regarding your specific situation before making any decisions.

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4. Searching for Eligible Charities

a. Click "Grant", then "Grant to charities".
b. Click "Find a charity".
c. Search by organization name, EIN, keyword, or location.
d. Eligible public charities will appear with a "Verified" icon.
e. Can't find your charity?
    i. Select "Add a New Charity" and provide its details.
    ii. Fidelity Charitable will verify the organization's eligibility before processing your grant.

5. Tracking your Account Activity

a. Go to "History" in the top navigation bar
b. You'll see a summary of:
    i. Past contributions
    ii. Grants made
    iii. Investment changes
    iv. Account balances

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

Call: (920) 785-6010

Visit: www.EndowmentWM.com