

RECOMMENDING A GRANT



FIDELITY CharitableSM

Accounts (36)*Your Giving Account
#XXXXX***Grant***Support your
favorite charities***Contribute***Fund your
Giving Account***Invest***Review or update
investments***History***Access transaction
history & statements***Guidance***Develop your
giving strategy*

Welcome to the new Fidelity Charitable!

Your Giving Account

Giving Account #XXXXX

\$7,925.45■ Available
\$6,326.45■ Pending grants
\$1,599.00

Grant to charities >

Fund your Giving Account >



Maximize your impact

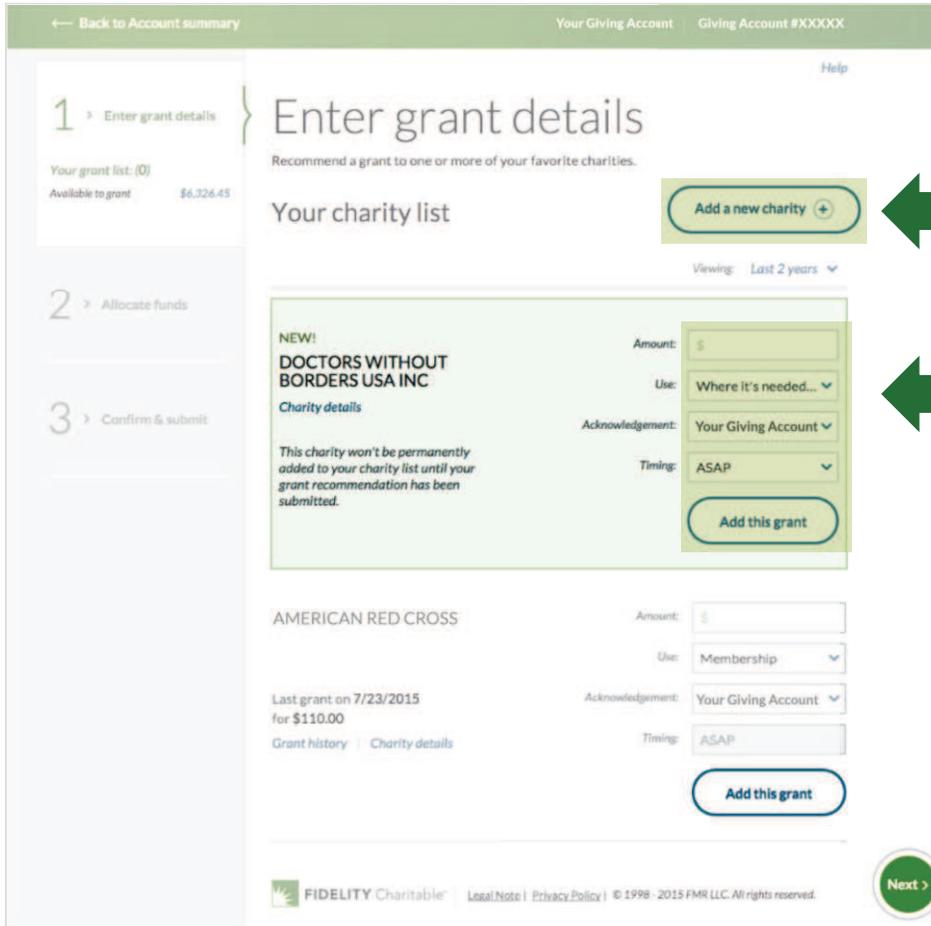
Donating appreciated securities is one of the most tax efficient ways to support the causes you care about most. Are you maximizing your deduction?

[Learn how](#)

Select **“GRANT TO CHARITIES”** from your Giving Account[®] dashboard page



STEP 1



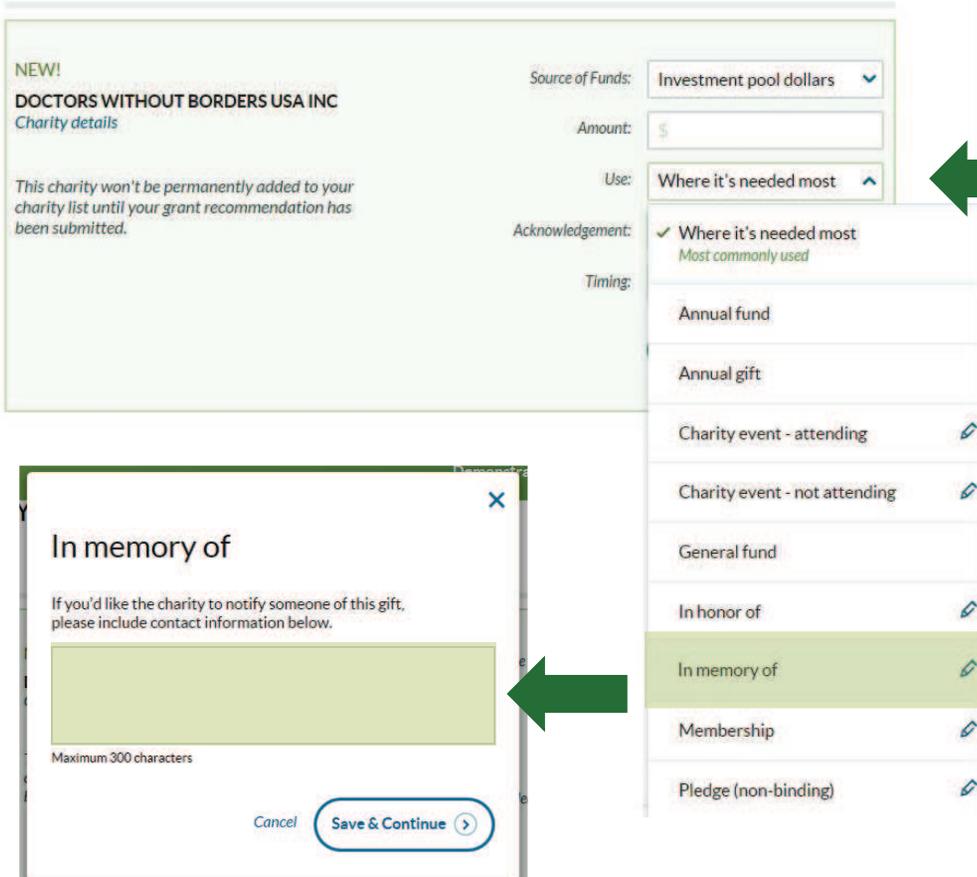
Select the charities from the list of charities you have supported in the past or find a new charity by clicking on **“ADD A NEW CHARITY”** button

To the right of the charity name, indicate:

- The grant recommendation amount
- A use for the grant recommendation from the drop down
- How you would like the grant to be acknowledged
- The timing for the grant recommendation.

You can make up to 100 grant recommendations at a time.

STEP 2



NEW!
DOCTORS WITHOUT BORDERS USA INC
Charity details

This charity won't be permanently added to your charity list until your grant recommendation has been submitted.

Source of Funds: Investment pool dollars

Amount: \$

Use: Where it's needed most

Acknowledgement: Where it's needed most
Most commonly used

Timing:

- Annual fund
- Annual gift
- Charity event - attending
- Charity event - not attending
- General fund
- In honor of
- In memory of**
- Membership
- Pledge (non-binding)

In memory of

If you'd like the charity to notify someone of this gift, please include contact information below.

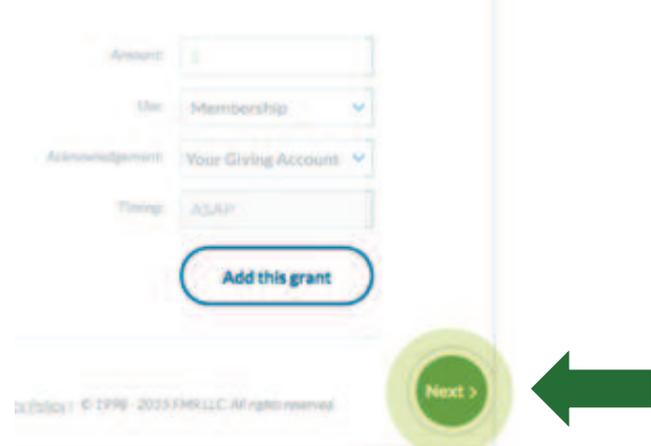
Maximum 300 characters

Cancel Save & Continue

To indicate how a grant recommendation should be used:

- Click the drop down and select a use
- To edit, click the pencil icon
- Type in free form box
- Click save & continue

When complete, select **"ADD THIS GRANT"** for each of your planned grant recommendations and then select the **"NEXT"** button at the bottom of the page



Amount: \$

Use: Membership

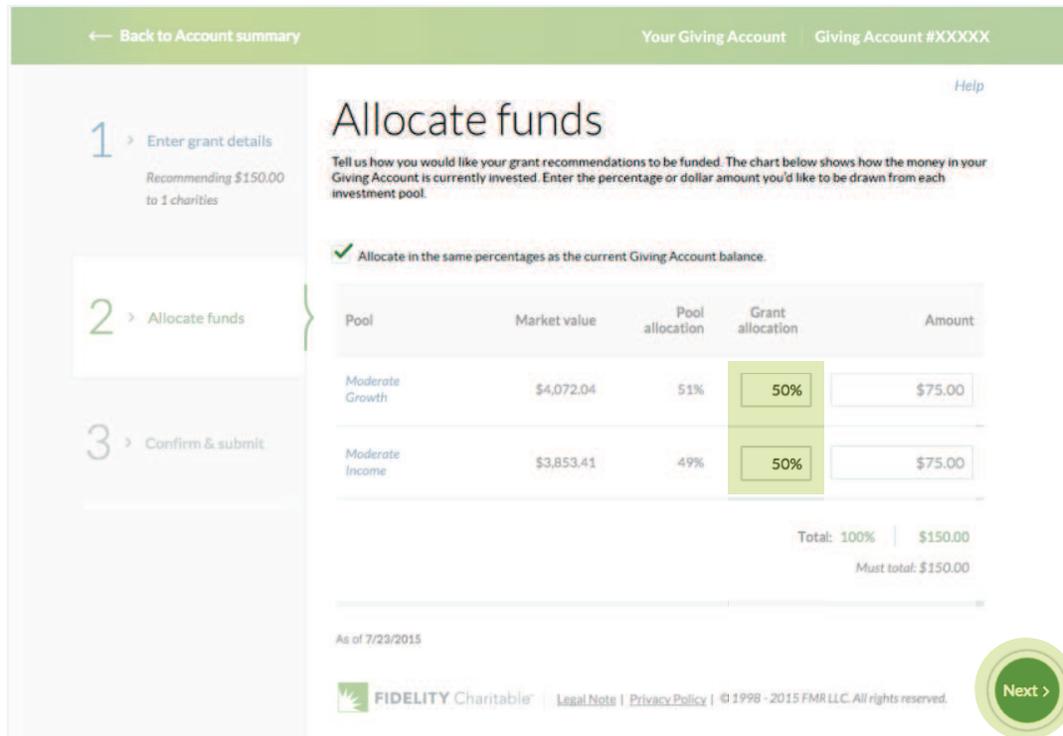
Acknowledgement: Your Giving Accounts

Timing: ASAP

Add this grant

Next >

STEP 3



← Back to Account summary

Your Giving Account | Giving Account #XXXXX

1 > Enter grant details
Recommending \$150.00 to 1 charities

2 > Allocate funds

3 > Confirm & submit

Allocate funds

Tell us how you would like your grant recommendations to be funded. The chart below shows how the money in your Giving Account is currently invested. Enter the percentage or dollar amount you'd like to be drawn from each investment pool.

✓ Allocate in the same percentages as the current Giving Account balance.

| Pool | Market value | Pool allocation | Grant allocation | Amount |
|-----------------|--------------|-----------------|------------------|---------|
| Moderate Growth | \$4,072.04 | 51% | 50% | \$75.00 |
| Moderate Income | \$3,853.41 | 49% | 50% | \$75.00 |

Total: 100% | \$150.00
Must total: \$150.00

As of 7/23/2015

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Next >

Tell us how you would like your grant recommendations to be funded. The chart shows how the money in your Giving Account is currently invested. Enter the percentage or dollar amount you would like to be drawn from each investment pool. You also have the ability to allocate your funds in the same percentage as the current Giving Account balance.

If your Giving Account is invested in only one pool or your advisor manages the investments in your Giving Account through the Charitable Investment Advisor Program and all your grant recommendations will be funded through that source, you will not be prompted to provide an allocation.

Select “**NEXT**” when complete.

STEP 4

← Back to Account summary Your Giving Account Giving Account #XXXXX Help

1 > Enter grant details
Recommending \$150.00 to 1 charities

2 > Allocate funds
Moderate Growth 50%
Moderate Income 50%

3 > Confirm & submit

Confirm & submit

Please review your selections before submitting your grant recommendations.

Grant details [edit](#)

DOCTORS WITHOUT BORDERS USA INC \$150.00

| | | |
|------------------------|---------------------|---------|
| Use: | Acknowledgement: | Timing: |
| Where it's needed most | Your Giving Account | ASAP |

Total: \$150.00

Allocation [edit](#)

| Pool | Allocation | Amount |
|-----------------|------------|---------|
| Moderate Growth | 50% | \$75.00 |
| Moderate Income | 50% | \$75.00 |

Agreement

- I have read the Fidelity Charitable Policy Guidelines.
- None of the charities above will provide me or anyone else a more than incidental benefit in exchange for a grant. Examples of grants that may include impermissible benefits include grants used for memberships, charity events, or non-binding pledges.
- I understand that IRS penalties may apply if I recommend a grant that results in impermissible benefits.
- I will disregard any tax receipt I receive, because neither I nor anyone else is entitled to an income tax charitable deduction at this point.

I agree to the statements above.

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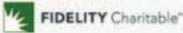
[Submit >](#)

Confirm that your grant recommendations are correct and check the box to indicate that you agree to the items under "Agreement."



Select "SUBMIT" to complete the grant recommendation process.




[+] Feedback Customer service Your profile Log out

Accounts (36)
Your Giving Account
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Thank you!

Grant recommendations typically take 1 - 5 business days to be processed and are subject to approval by the Trustees of Fidelity Charitable. You can track the status of your grant recommendations in your [grant history](#).

 Print

Tell us what you think

If you have any feedback about this experience, we'd love to hear it.

[\[+\] Feedback](#)

Grant details

DOCTORS WITHOUT BORDERS USA INC
\$150.00

Use:
Where it's needed most

Acknowledgement:
Your Giving Account

Timing:
ASAP

Grant ID: 6342697

Total: \$150.00

Allocation

| Pool | Allocation | Amount |
|-----------------|------------|---------|
| Moderate Growth | 50% | \$75.00 |

You will receive a confirmation once you have submitted your grant recommendation