FIDELITY Charitable®
Make more of a difference

HOW-TO

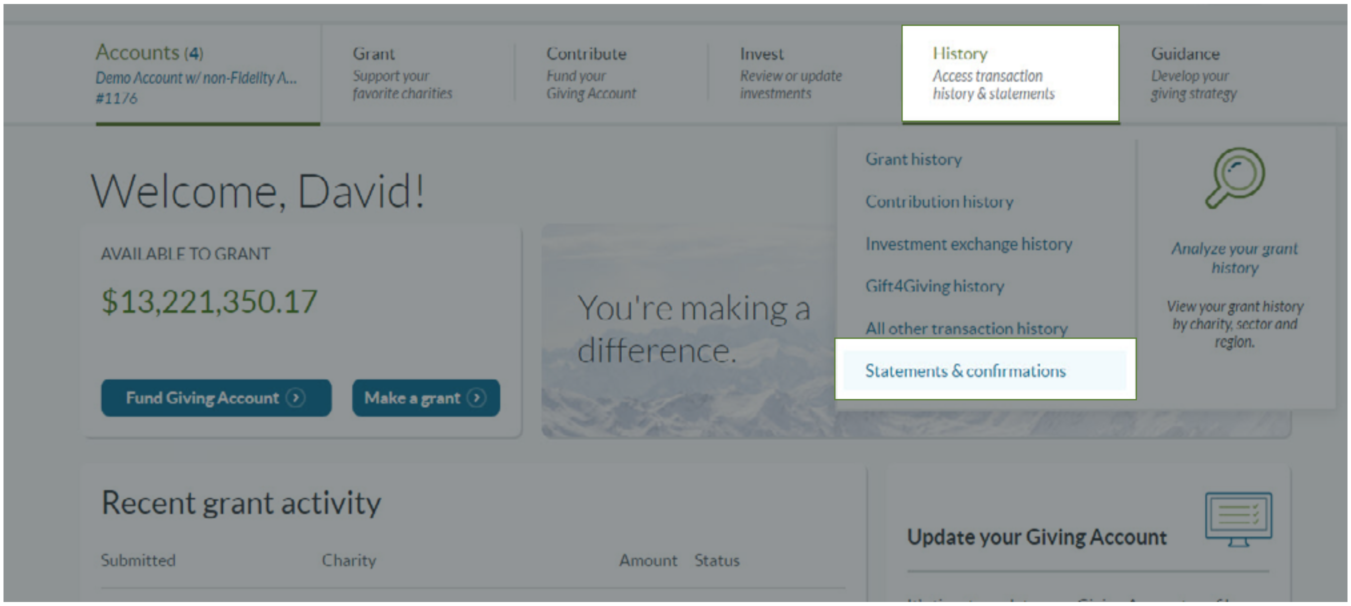
View and Download Statements, Confirmations, and Tax Forms

Among the many benefits of the Giving Account®, you can streamline your tax recordkeeping in one convenient location. Whether you're looking for quarterly statements, contribution and grant confirmations, or tax documents such as Form 8283, you'll find them all easily accessible online within your Giving Account®.

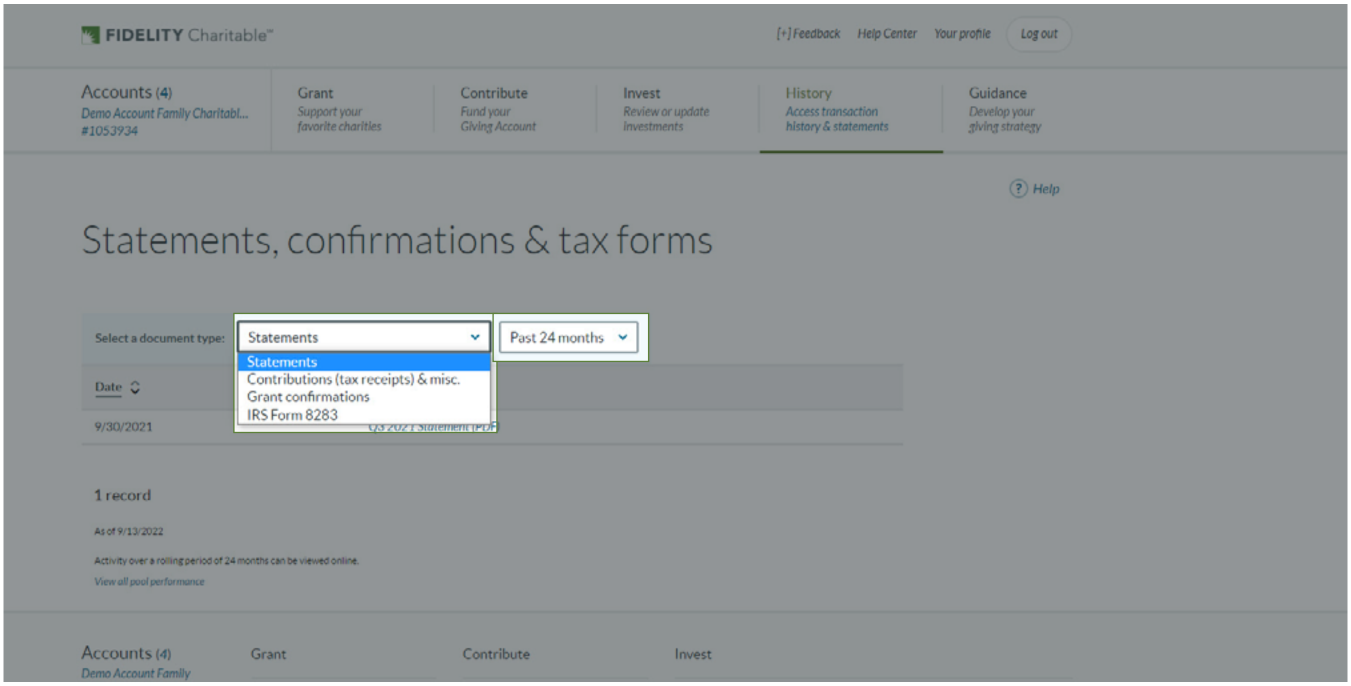
Here's how to locate them:

1. **Log in to your Giving Account.**

2. **Locate the "*History*" tab along the top and select "*Statements & Confirmations*."**



3. **From the drop-down menus, select the document type and time period you are referencing**



a. **Statements |** *View your account summary, such as beginning and ending quarterly balances, investment pool holdings, and other transactions*

b. **Contributions (tax receipts) |** *Use these when preparing your taxes to track your charitable deductions*

c. **Grant confirmations |** *View these to verify your grant recommendation was completed and the funds were sent to the grant recipient*

d. **IRS Form 8283 |** *Use IRS Form 8283 to report information to the IRS about noncash charitable contributions when the amount of all noncash gifts is more than $500.*

4. **Click the document name to view and download the PDF.**

Frequently Asked Questions

What is Fidelity Charitable's tax information?

Fidelity Charitable® is a tax-exempt nonprofit organization and public charity under Internal Revenue Code Section 501(c)(3). Fidelity Charitable's federal Tax Identification Number is: 11-0303001

When will Fidelity Charitable® send out my IRS Form 8283?

Fidelity Charitable aims to send all tax forms by the end of February. Donors and advisors are notified when forms are available, but blank forms can also be obtained from the IRS website.

How long will it take for the grant I recommended to be processed?

Grant recommendations typically take 2–10 business days to be processed and are subject to approval by the Fidelity Charitable Trustees. The time and due diligence necessary to process a grant recommendation may vary based on the grantee or use of the grant.

Conducting transactions online is the easiest and most efficient way to use your Giving Account.

Don't see what you're looking for?

Call **1-800-952-4438** to speak with a member of our Donor Services team. We look forward to helping you fulfill your charitable giving goals.
