

HOW-TO

Get started with your Giving Account

Now that you've opened your Giving Account®, let's get started. Access your Giving Account® anytime, anywhere. Using your account online is not only convenient, but it could speed up processing time as well.

START HERE

Access your Giving Account



Once logged in, you can:

Donate

Contributions to your Giving Account can be made with a check, wire transfer, or electronic funds transfer from a bank or brokerage account. Once you log in, you can make any of these contributions by clicking the "Fund Giving Account" button. To donate non-publicly traded stock, a life insurance policy, cryptocurrency and more, please contact us. After you donate, a tax receipt becomes available online.

Select an investment option

By investing your contribution, your gift has the potential to grow. Use our Investment Pool Selector to match your giving goals to an asset allocation. Make or change an investment pool selection and view performance at any time online. Once you log in to your account, click the "Invest" tab at the top of the page and go to the right-hand side of the drop-down menu to select "Choose the right asset allocation. Our Pool Selector Tool can help."

Expand access

Add additional account holders or designate full or partial access for your financial advisor by using the Giving Account Access form.

[Giving Account Access form](#)

Successor information

By naming a successor, your charitable legacy continues in your absence. Name an individual, designate a charity, or a combination of both. Elections can be changed at any time. Once you log in to your account, go to the top right of the page and click "Your profile." Click the "Successors" tab to make changes.

[Name a successor](#)

Recommend a grant

Make informed giving decisions using these tools and resources. Recommend a grant to most qualified 501(c)(3) public charities, with a few exceptions. All grants are subject to approval by the Trustees of Fidelity Charitable®. If you plan to repeat a grant, schedule it to recur at your desired cadence. Once you log in, you can initiate grants by clicking the "Make a grant" button.

[Tools and resources](#)

Additional Resources

Reference our Giving Account Guide for help you may need when utilizing 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.

[Giving Account Guide](#)

1-800-952-4438