

## **Endowed Giving Program**Investment Pool Selection Form

At the time of Activation of the Endowed Giving Program, investments in the Charitable Investment Advisor Program and/or the Charitable DonorFlex Program<sup>SM</sup> will be liquidated in a prudent manner and the proceeds invested in Fidelity Charitable investment pools. Account Holders may provide an investment pool allocation recommendation, to be effective at the time of Activation and applicable to the entire Endowed Giving Program Giving Account® balance, by submitting this form. Please refer to the *Fidelity Charitable Program Guidelines* for additional information.

Type or print clearly in CAPITAL letters and black ink. If you need more room for information or signatures, make a copy of the relevant page.

## 1. Account Holder and Giving Account®

	Account Holder Name	
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	Giving Account Name	Giving Account Number

## 2. Investment Pool Selection

Recommend how to allocate your Endowed Giving Program Giving Account balance upon Activation. Please review pool descriptions before making your recommendation. Descriptions are available at **FidelityCharitable.org** or by calling us at 800-952-4438.

Choose from Options 1, 2, 3, or 4, or a combination of the four. The combined total must equal 100%.

Option 1: Asset Allocation Pools	Percentage of	iotai
For donors seeking instant diversification to multiple asset classes in a single investment.		
Aggressive Growth (85% Equity)		%
Growth (70% Equity)	1 1	%
☐ Moderate Growth (60% Equity)		%
Balanced (50% Equity)		%
Moderate Income (40% Equity)		%
☐ Income (30% Equity)		%
Conservative Income (20% Equity)		%
Option 2: Single Asset Class Pools	Percentage of	Total
For donors who want to build a custom strate combining pools with specific investment objectives for Giving Account balances.	gy	
Domestic Stock		
U.S. Equity		%
U.S. Equity Access		%
Total Market Index		%
Foreign Stock		
☐ International Equity		%
International Equity Access		%
International Index		%
Bond		
Fixed Income		%
Fixed Income Access		%
U.S. Bond Index		%
Short-Term Fixed Income Access		%
☐ Inflation Protected Bond Index		%
Money Market		
☐ Money Market		%

Option 3: Sustainable and Impact Investing Pools	Percentage of Total
For donors who seek strategies that consider social and environmental factors, while emphasizing financial returns.	
Stock	
Sustainable U.S. Index	%
Sustainable U.S. Index Access	%
Sustainable International Index	%
Environmental Impact Access	%
Bond	
Sustainable U.S. Bond Index	%
Option 4: Charitable Legacy Pool	Percentage of Total
For donors seeking an "all-weather" asset allocation pool with exposure to both traditional and non-traditional asset classes.	

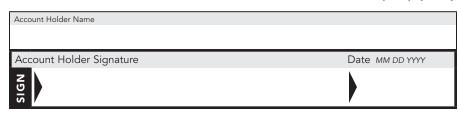
☐ Charitable Legacy

Form continues on next page.

## 3. Signatures and Dates

By signing below, you:

- Acknowledge that you have read Fidelity Charitable Program Guidelines and agree to the terms and/or conditions described therein
- Understand that all investment pool recommendations and allocations are subject to ongoing review and approval by Fidelity Charitable (before and after Activation of the Endowed Giving Program).
- Understand that by establishing the Endowed Giving Program, the Trustees do not intend to confer or constitute a contractual, trust, or other fiduciary relationship with participating Account Holders,
- grant recipients, or any other person, and that the Trustees may modify, amend, or eliminate the Endowed Giving Program at any time.
- Understand that under the terms of the Endowed Giving Program, Fidelity Charitable® is specifically authorized to expend as much income and principal as the Trustees deem appropriate. See Fidelity Charitable Program Guidelines for complete details.
- Certify that to the best of your knowledge all information presented in connection with this form is accurate.
- Will promptly notify Fidelity Charitable in writing of any changes.



**Sign the form and send or fax to Fidelity Charitable. Questions?** Go to FidelityCharitable.org or call 800-952-4438.

Fax the form to 877-665-4274.

Regular mail Fidelity Charitable PO Box 770001 Cincinnati, OH 45277-0053 Overnight mail Fidelity Charitable 100 Crosby Parkway Mail zone KC1D-FCS Covington, KY 41015-9325

Fidelity Charitable is the brand name for the Fidelity Investments® Charitable Gift Fund, an independent public charity with a donor-advised fund program. Various Fidelity companies provide services to Fidelity Charitable. Fidelity Charitable and Fidelity are registered service marks, and the Fidelity Charitable logo is a service mark, of FMR LLC, used by Fidelity Charitable under license. Giving Account is a registered service mark, and the Charitable DonorFlex Program is a service mark, of the Fidelity Investments Charitable Gift Fund. 807965.5.0 (09/2022)

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