

# Endowed Giving Program Enrollment Form

Use this form to enroll in the Endowed Giving Program, which allows Giving Account® Holders to support charitable organizations beyond their lifetime by enabling ongoing grants to up to ten (10) charitable beneficiaries. A \$100,000 minimum Giving Account® balance is required at Activation, which occurs at the death of the last remaining Account Holder. 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.

*Note: At the time of Activation of the Endowed Giving Program, investments in the Charitable Investment Advisor Program ("CIAP") and/or the Charitable DonorFlex Program<sup>SM</sup> ("DonorFlex") will be liquidated in a prudent manner and the proceeds invested in Fidelity Charitable® investment pools. If no recommended investment pool allocation has been made by the Account Holder, the proceeds will be invested in the Asset Allocation 20% Equity Pool at the time of Activation. Please refer to the Fidelity Charitable: Program Guidelines for additional information.*

Check one, if applicable.

- I am participating in CIAP and/or DonorFlex and, once enrolled in the Endowed Giving Program, I recommend these balances be proportionately allocated to the investment pools recommended on the Endowed Giving Program Investment Pool Selection Form, at the time of Activation. I understand that all investment pool recommendations and allocations are subject to ongoing review and approval by Fidelity Charitable.
- I am participating in CIAP and, once enrolled in the Endowed Giving Program, I recommend having my CIAP-qualified investment firm continue to manage the assets in the Endowed Giving Program, at the time of Activation. I understand that all investment firms participating in CIAP are subject to ongoing review and approval by Fidelity Charitable.

## 1. Giving Account Number

Check one.

- I am establishing a new Giving Account.       I currently have a Giving Account.       Un-enroll from EGP

*By unenrolling in EGP, you will need to update successors online, by phone, or completing a change form.*

Giving Account Number

## 2. Rename the Giving Account

Complete this section to change the Giving Account name upon Activation of the Endowed Giving Program. Typically, Account Holders choose a name in honor of themselves (e.g., "The Smith Family Memorial Fund").

Giving Account Name

## 3. Endowed Giving Program Duration and Annual Distribution Percentage

If no duration (term length) is stated, ongoing grants to charitable beneficiaries will continue in perpetuity. The term length will apply to ALL elected beneficiaries.

Term Length (minimum 5 years)

OR

Total annual percentage (minimum 5%) of account balance to be distributed to recommended Endowed Giving Program beneficiaries:

Total Annual %

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*\* The Endowed Giving Program requires a minimum total annual distribution amount of 5% of the Giving Account balance or applicable IRS minimum percentage. If amounts distributed in a given year do not meet this minimum, Fidelity Charitable® will calculate and distribute the difference to the charitable grant recipients in the same proportion as recommended. Distribution calculations are based on the Giving Account balance as of December 31 of the prior calendar year and go out annually.*



### 4. Endowed Giving Program Beneficiary Recommendations

#### Grant Acknowledgement

Account Name     First and Last Name     Anonymous

#### Endowed Giving Program Beneficiary #1

% of Total Annual Distribution to Charity from Giving Account

Organization Name Federal Tax ID Number *if known*

Legal Address

City State/Province ZIP/Postal Code Phone Number

#### Endowed Giving Program Beneficiary #2

This is my Alternate Beneficiary:\*

Yes     No

% of Total Annual Distribution to Charity from Giving Account

Organization Name Federal Tax ID Number *if known*

Legal Address

City State/Province ZIP/Postal Code Phone Number

*\* If you are recommending only one Endowed Giving Program Beneficiary, you have the opportunity to also recommend an Alternate Beneficiary, in the case that your recommended beneficiary becomes ineligible. If you do not recommend an Alternate Beneficiary, or if the alternate becomes ineligible, the remaining Giving Account balance will be granted out in accordance with the Fidelity Charitable Trustees' Initiative.*

#### Endowed Giving Program Beneficiary #3

% of Total Annual Distribution to Charity from Giving Account

Organization Name Federal Tax ID Number *if known*

Legal Address

City State/Province ZIP/Postal Code Phone Number

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**Endowed Giving Program Beneficiary #4**

% of Total Annual Distribution to Charity from Giving Account

Organization Name

Federal Tax ID Number *if known*

Legal Address

City

State/Province

ZIP/Postal Code

Phone Number

**Endowed Giving Program Beneficiary #5**

% of Total Annual Distribution to Charity from Giving Account

Organization Name

Federal Tax ID Number *if known*

Legal Address

City

State/Province

ZIP/Postal Code

Phone Number

**Endowed Giving Program Beneficiary #6**

% of Total Annual Distribution to Charity from Giving Account

Organization Name

Federal Tax ID Number *if known*

Legal Address

City

State/Province

ZIP/Postal Code

Phone Number

**Endowed Giving Program Beneficiary #7**

% of Total Annual Distribution to Charity from Giving Account

Organization Name

Federal Tax ID Number *if known*

Legal Address

City

State/Province

ZIP/Postal Code

Phone Number

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**Endowed Giving Program Beneficiary #8**

% of Total Annual Distribution to Charity from Giving Account

Organization Name

Federal Tax ID Number *if known*

Legal Address

City

State/Province

ZIP/Postal Code

Phone Number

**Endowed Giving Program Beneficiary #9**

% of Total Annual Distribution to Charity from Giving Account

Organization Name

Federal Tax ID Number *if known*

Legal Address

City

State/Province

ZIP/Postal Code

Phone Number

**Endowed Giving Program Beneficiary #10**

% of Total Annual Distribution to Charity from Giving Account

Organization Name

Federal Tax ID Number *if known*

Legal Address

City

State/Province

ZIP/Postal Code

Phone Number

**COMBINED TOTAL OF ENDOWED GIVING PROGRAM BENEFICIARY(IES) MUST EQUAL 100%**  %

*IMPORTANT NOTE: If you are electing individual and/or IRS-qualified public charity successors in addition to the Endowed Giving Program recommendations above, please ensure that the combined total of your successor elections, including your Endowed Giving Program recommendations, equals 100%. Please refer to the Fidelity Charitable: Program Guidelines for additional information.*

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## 5. Pool Selection

Recommend how to allocate your contribution by choosing from Option 1, 2, 3, or 4, or a combination of the four. Combined total must be 100% and only whole percentages will be accepted. If you do not make a recommendation for an initial contribution, your contribution will be allocated to the Asset Allocation 20% Equity Pool. Please review pool descriptions before making your recommendation. Descriptions are available at [FidelityCharitable.org](http://FidelityCharitable.org) or by calling us at 800-952-4438.

For donors seeking instant diversification to multiple asset classes in a single investment. These pools have a mix of stocks, bonds, and short-term instruments that range from a higher equity allocation mix to a lower equity allocation mix.

Our Pool Selector at [FidelityCharitable.org](http://FidelityCharitable.org) may help you select an Asset Allocation Pool based on your giving goals and investment risk tolerance for your Giving Account.

Option 1: Asset Allocation Pools	Percentage of Total
<input type="checkbox"/> Asset Allocation 85% Equity	<input type="text"/> %
<input type="checkbox"/> Asset Allocation 70% Equity	<input type="text"/> %
<input type="checkbox"/> Asset Allocation 60% Equity	<input type="text"/> %
<input type="checkbox"/> Asset Allocation 50% Equity	<input type="text"/> %
<input type="checkbox"/> Asset Allocation 40% Equity	<input type="text"/> %
<input type="checkbox"/> Asset Allocation 30% Equity	<input type="text"/> %
<input type="checkbox"/> Asset Allocation 20% Equity	<input type="text"/> %

For donors who want to build a custom strategy combining pools with specific investment objectives for Giving Account balances.

Option 2: Single Asset Class Pools	Percentage of Total
<b>Domestic Stock</b>	
<input type="checkbox"/> U.S. Equity	<input type="text"/> %
<input type="checkbox"/> U.S. Equity Access	<input type="text"/> %
<input type="checkbox"/> Total Market Index	<input type="text"/> %
<b>Foreign Stock</b>	
<input type="checkbox"/> International Equity	<input type="text"/> %
<input type="checkbox"/> International Equity Access	<input type="text"/> %
<input type="checkbox"/> International Index	<input type="text"/> %
<b>Bond</b>	
<input type="checkbox"/> Fixed Income	<input type="text"/> %
<input type="checkbox"/> Fixed Income Access	<input type="text"/> %
<input type="checkbox"/> U.S. Bond Index	<input type="text"/> %
<input type="checkbox"/> Short-Term Fixed Income Access	<input type="text"/> %
<input type="checkbox"/> Inflation Protected Bond Index	<input type="text"/> %
<b>Money Market</b>	
<input type="checkbox"/> Money Market	<input type="text"/> %

For donors who seek strategies that consider social and environmental factors, while emphasizing financial returns.

Option 3: Sustainable and Impact Investing Pools	Percentage of Total
<b>Stock</b>	
<input type="checkbox"/> Sustainable U.S. Index	<input type="text"/> %
<input type="checkbox"/> Sustainable U.S. Index Access	<input type="text"/> %
<input type="checkbox"/> Sustainable International Index	<input type="text"/> %
<input type="checkbox"/> Environmental Impact Access	<input type="text"/> %
<b>Bond</b>	
<input type="checkbox"/> Sustainable U.S. Bond Index	<input type="text"/> %

For donors seeking an "all-weather" asset allocation pool with exposure to both traditional and non-traditional asset classes.

Option 4: Charitable Legacy Pool	Percentage of Total
<input type="checkbox"/> Charitable Legacy	<input type="text"/> %

Combined Total (must equal 100%)  %

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## 6. Signature(s)

### Account Holder Signature

By signing below, you:

- Acknowledge that you have read Fidelity Charitable: Program Guidelines and agree to the terms and/or conditions described therein.
- Certify that grant recommendations made herein adhere to these guidelines and neither you nor anyone else will receive any more than incidental benefits from the recommended charitable organizations from these grants if distributed, and that these grants do not fulfill pre-existing legally enforceable pledges to the recommended charitable organizations.
- 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.
- I understand Fidelity Charitable may modify the grant recommendations prior to disbursement to ensure they meet Fidelity Charitable's grantmaking guidelines.

Account Holder Name

Account Holder Signature

Date MM/DD/YYYY

**SIGN**



**Did you sign the form and attach any necessary documents?**

Send form and any attachments to Fidelity Charitable.

**Questions?** Go to [FidelityCharitable.org](http://FidelityCharitable.org) or call 800-952-4438.

*Fax the form to:*  
877-665-4274

OR

*Mail the form to:*  
Fidelity Charitable  
PO Box 770001  
Cincinnati, OH 45277-0053

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