

Fidelity Charitable®
Public Disclosure and Inspection Policy

Policy: Pursuant to and consistent with Regulations sections 301.6104(d)-1 through 3, Fidelity Charitable® shall:

- Make its **application for recognition of exemption*** available for public inspection without charge at its principal office during regular business hours;
- Make its **annual information returns**** available for public inspection without charge at its principal office during regular business hours;
- Make each annual information return available for a period of 3 years beginning on the date the return is required to be filed (determined with regard to any extension of time for filing) or is actually filed, whichever is later; and
- Provide a copy without charge (for Form 990-T, this requirement applies only to Forms 990-T filed after August 17, 2006), other than a reasonable fee for reproduction and actual postage costs, of all or any part of any application or return required to be made available for public inspection to any individual who makes a request for such copy in person or in writing (except as provided in Regulations sections 301.6104(d)-2 and 3).

***“Application for recognition of exemption”** includes:

- Fidelity Charitable’s application form (Form 1023),
- All documents and statements the IRS required Fidelity Charitable to file with the form,
- Any statement or other supporting document submitted by Fidelity Charitable in support of the application, and
- Any letter or other document issued by the IRS concerning Fidelity Charitable’s application.

****“Annual information return”** includes:

- An exact copy of the Form 990 filed by Fidelity Charitable as required by section 6033.
- Any amended return Fidelity Charitable may file with the IRS after the date the original return is filed.
- An exact copy of Form 990-T, if one is filed.

The copy shall include all information furnished by Fidelity Charitable to the IRS on Form 990 or 990-T, as well as all schedules, attachments, and supporting documents, except for the name and address of any contributor to Fidelity Charitable. However, schedules, attachments, and supporting documents filed with Form 990-T that do not relate to the imposition of unrelated business income tax may not be made available for public inspection and copying. *See* Notice 2008-49, 2008-20 I.R.B. 979.

Time and Manner of Fulfilling Written Requests:

IF Fidelity Charitable...	THEN Fidelity Charitable...
Receives a written request for a copy,	Shall mail the copy of the requested documents (or the requested parts) within 30 days from the date it receives the request.
Mails the copy of the requested document,	Is deemed to have provided the copy on the postmark date or private delivery mark (if sent by certified or registered mail, the date of registration or the date of the postmark on the sender's receipt).
Receives a request by mail,	Is deemed to have received it 7 days after the date of the postmark, absent evidence to the contrary.
Receives a request transmitted by email or fax,	Is deemed to have received it the day the request is transmitted successfully.
Receives consent from an individual making a request,	Can provide a copy of the requested document exclusively by electronic mail (the material is provided on the date the organization successfully transmits the electronic mail.

Internet Posting: Fidelity Charitable makes its annual information return widely available by posting the document on its website (www.fidelitycharitable.org).

Other Means of Requesting Documents:

- Requests made **in person** should be made at Fidelity Charitable’s headquarters:

Fidelity Charitable
300 New Millennium Way
Durham, NC 27709

- Requests made **by mail** should be sent to Fidelity Charitable at:

Fidelity Charitable
P.O. Box 770001
Cincinnati, OH 45277-0053

- Requests made **by telephone** should be made to Fidelity Charitable’s donor service representatives by calling:

(800) 952-4438

- Requests made **by fax** should be sent to Fidelity Charitable’s donor service representatives at the following fax number:

(877) 665-4274