



7 reasons to offer charitable planning



Charitable planning may help grow your practice

Our research has found that firms that offer charitable planning have higher growth and higher assets under management per client.¹

Charitable planning can boost client satisfaction

Net Promoter Score is 2.5 times higher among investors who receive help with charitable giving from their advisor compared to those who want help but don't receive it.²

Investors want to talk to their advisor about philanthropy

More than 7 in 10 high-net-worth clients agree that discussing philanthropy with their advisor is important.³

Your clients and prospects are likely already giving to charity

According to a recent study, 85% of affluent households gave to charity in 2022.⁴

Charitable giving continues to rise

According to the Giving USA 2024 study, Americans are continuing their tradition of philanthropy, with over \$550 billion contributed to charities in 2023.⁵

Nonprofit organizations need support

Helping donors support the causes they care about makes you part of the team that is making a difference.

You can help your clients meet their broader goals

Your clients may be missing an opportunity to save on taxes while increasing the size of their charitable donation. Your guidance can help them give smarter.

Grow your practice with charitable planning.

Contact a Charitable Planning Expert today. Call 800-262-6039 or visit FidelityCharitable.org/advisors

¹ The 2023-2024 Fidelity Financial Advisor Community – Profile Survey Panelists agree to participate in an online advisor panel (Fidelity not identified as the sponsor) and complete various research engagements throughout the year. Panel participants are screened to be financial advisors who manage or advise upon client assets (either individually or as a team) and work primarily with individual investors. 809 panelists participated in the Profile Survey, which was fielded between Nov 27, 2023 through May 8, 2024, and included questions about their practices and services offered. Advisor firm types included a mix of banks, independent broker-dealers, insurance companies, regional broker-dealers, RIAs, and national brokerage firms (commonly referred to as wirehouses), with findings weighted to reflect industry composition. The study was conducted by an independent firm not affiliated with Fidelity Investments.

² The 2024 Fidelity Investor Insights Study was conducted during the period November 7 through December 19, 2023. It surveyed a total of 2,100 investors, including 696 Millionaires and 1,289 investors with advisors. The study was conducted via an online survey, with the sample provided by Brookmark, a third-party firm not affiliated with Fidelity. Respondents were screened for a minimum level of \$50K in investable assets (excluding retirement assets and primary residence), with additional quotas by age and affluence levels.

³ 2018 U.S. Trust Study of High Net Worth Philanthropy, conducted in partnership with the Indiana University Lilly Family School of Philanthropy.

⁴ 2023 Bank of America Study of Philanthropy “Charitable Giving by Affluent Households,” conducted in partnership with the Indiana University Lilly Family School of Philanthropy.

⁵ “Giving USA 2024 Study,” Lilly Family School of Philanthropy.

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