The Philanthropic Advice Program

What is the Philanthropic Advice Program?

Fidelity Charitable® is dedicated to fostering strategic philanthropy and recognizes that some donors often need in-depth support for their grant recommendation strategies that is best provided by subject matter experts. One of the program offerings at Fidelity Charitable® is the Philanthropic Advice Program.

Through this Program, donors can work with a dedicated philanthropic advisor to develop a customized consulting engagement, helping to advance and execute on a donor's philanthropic vision to enhance grantmaking from their donor-advised fund at Fidelity Charitable.

What services can the program provide?

Fidelity Charitable and its donors have worked with philanthropic advisors in a variety of ways, including:

- **Creating a philanthropic strategy**
- **Sourcing and researching giving opportunities**
- **Identifying other aligned funders or learning partners**
- **Evaluating and reporting on grant effectiveness**
- **Facilitating discussions on philanthropy**
- **Governance and board meeting support for grant recommendation strategy**

All services provided by philanthropic advisors must correlate with grantmaking from the respective donor's Giving Account® and meet our Philanthropic Advice Program guidelines and the Fidelity Charitable Program Guidelines.

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Make more of a difference

Can I utilize a philanthropic advisor outside of your current list of approved advisors?

Fidelity Charitable currently works with a variety of pre-approved philanthropic advisors, however, the Philanthropic Advice Program welcomes out-of-network advisors recommended by donors for consideration.

Fidelity Charitable vets such prospective advisors using standards established by the Trustees. A Philanthropic Advisor must have the requisite experience and qualifications to provide philanthropic advisory services that directly enhance Fidelity Charitable grantmaking. Due diligence includes, but is not limited to, ensuring the prospective advisor has a business entity and evidence of expertise.

Once an advisor has been vetted, their onboarding process includes a background check, signing an advisor agreement, and drafting a customized Statement of Services for each enrolled Giving Account to include services that are compliant with Fidelity Charitable policies. On average, the process can take six to eight weeks.

Onboarding process

1. ### Check

   Complete due diligence to ensure advisor has evidence of expertise.

   Run a background check.

2. ### Sign

   Sign an advisor agreement.

3. ### Draft

   Draft a customized Statement of Services for each enrolled Giving Account to include services that are compliant with Fidelity Charitable policies.

How is a philanthropic advisor paid?

Associated fees for an engagement with a philanthropic advisor will primarily depend on the services delivered. Common pricing models include project-based fees and hourly fees. All fees must relate to grantmaking activity established under a Statement of Services within the time of that anticipated grantmaking or within the preceding or upcoming 2 years. Fidelity Charitable will evaluate fees submitted by the Philanthropic Advisor to ensure they are consistent with Program guidelines. Fees that are approved by Fidelity Charitable will be assessed to the nominating Account Holder's Giving Account and paid by Fidelity Charitable to the Philanthropic Advisor.

Fidelity Charitable is the brand name for Fidelity Investments® Charitable Gift Fund, an independent public charity with a donor-advised fund program. Various Fidelity companies provide services to Fidelity Charitable. The Fidelity Charitable name and logo, and Fidelity are registered service marks, of FMR LLC, used by Fidelity Charitable under license. Giving Account is a registered service mark of the Trustees of Fidelity Charitable. 949984.3.0