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FIDELITY Charitable®
Make more of a difference

Questions? Go to FidelityCharitable.org or call 1-800-952-4438.

Giving Account® Change Form

Use this form to make changes to Giving Account® information. Sections 1 and 6 are required.

Please 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

Phone numbers are for questions about this request only; they will not update your Fidelity Charitable® contact information.

First Name	M.I.	Last Name	Giving Account Number

Mobile Phone	Alternative Phone	Extension

2. Remove Your Name as Account Holder

☐ Check here to authorize removal of your name as Account Holder. **Ensure** there is another Account Holder to assume Giving Account privileges, or **add** a new Account Holder in Section 3 below.

3. Change or Add Account Holder

Check one.

☐ **Update Current Information.** Complete the information in the fields below.

☐ **Add an Account Holder.** All Account Holder(s) named have full and equal privileges to recommend grants, recommend changes to pool allocations, name successors and name Additional Account Holders with the same privileges. All Giving Account correspondence will be sent to the Primary Account Holder, with the exception of confirmations related to contributions made by an Additional Account Holder. There can be up to four Account Holders. Attach additional sheets, if necessary. **The current Account Holder and the new Account Holder must also sign in Section 6.**

☐ Mr. ☐ Mrs. ☐ Miss ☐ Ms. ☐ Dr. ☐ Prof.

First Name	M.I.	Last Name	Social Security or Taxpayer ID Number

Date of Birth *MM DD YYYY*	Email

Mobile Phone	Alternative Phone	Extension

Legal Address

Provide the address used for tax reporting. Cannot be a PO Box, Mail Drop, or c/o.

Address			
City	**State/Province**	**ZIP/Postal Code**	**Country**

Mailing Address

☐ Same as legal / residential address

Address			
City	**State/Province**	**ZIP/Postal Code**	**Country**

Change or Add Account Holder continues on next page. ▶▶

Citizenship

Check one.

- ☐ U.S. citizen
- ☐ U.S. resident alien

Salutation

This will appear on Giving Account correspondence.

Address Salutation *e.g., Dr. and Mrs. John Smith; Joan and John Smith*

4. Change Giving Account Name

Grants are accompanied by a letter from Fidelity Charitable® that includes the Giving Account name, unless anonymity is specifically requested.

Giving Account Name

5. Change Giving Account Successor Recommendations

For more details, refer to the Fidelity Charitable Program Guidelines, available online at FidelityCharitable.org

Account Holders may name individuals to succeed them on the Giving Account (Individual Account Holders), and/or may recommend IRS-qualified public charities to receive part or all of the balance (Charitable Organizations). If no successor is elected upon notification of the death of the last remaining Account Holder, the Trustees will redeem the remaining units in the Giving Account and distribute the proceeds to the Fidelity Charitable Catalyst Fund. You may specify more than one successor for each option (attach additional sheets), and **you may choose any com-bination of the two successor options. (Total successor allocation among the two options must total 100%.)**

Please see page 3 for information about an additional option, the Endowed Giving Program.

A. Individual Account Holder *Attach additional sheets if more than one*

% of Giving Account
%

First Name	M.I.	Last Name	Social Security or Taxpayer ID Number

Date of Birth *MM DD YYYY*	Email	Relationship to Account Holder

Legal / Residential Address

Provide the address used for tax reporting. Cannot be a PO Box, Mail Drop, or c/o.

Address			
City	State/Province	ZIP/Postal Code	Country

Citizenship

Check one.

- ☐ U.S. citizen
- ☐ U.S. resident alien

Change Giving Account Successor Recommendations continues on next page. ▶▶

B. Charitable Organization *Attach additional sheets if more than two*

Organization #1

% of Giving Account
%

Organization Name	Taxpayer ID Number

Phone

Mailing Address

Address			
City	State/Province	ZIP/Postal Code	Country

Organization #2

% of Giving Account
%

Organization Name	Taxpayer ID Number

Phone

Mailing Address

Address			
City	State/Province	ZIP/Postal Code	Country

Endowed Giving Program *($100,000 minimum)*

Account Holders who wish to support charitable organizations beyond their lifetime by providing ongoing grants to up to six (6) charitable beneficiaries may enroll in the Endowed Giving Program. A $100,000 minimum Giving Account balance is required at activation, which occurs at the death of the last remaining Account Holder. Please refer to the Fidelity Charitable Program Guidelines and the Endowed Giving Program Enrollment Form found online at **FidelityCharitable.org** for eligibility and further details.

Form continues on next page. ▶▶

6. Signature(s)

Account Holder Signature

By signing below, you:

- Acknowledge you have read the current *Fidelity Charitable Program Guidelines* and agree to its terms and/or conditions described therein.
- 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.

Account Holder Name	
Account Holder Signature	Date *MM DD YYYY*
SIGN	

New Account Holder Signature *Any new Account Holder added in Section 3 must sign here. Attach additional sheets, if necessary.*

By signing below, you:

- Acknowledge you have read the current *Fidelity Charitable Program Guidelines* and agree to its terms and/or conditions described therein.
- 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.

New Account Holder Name	
New Account Holder Signature	Date *MM DD YYYY*
SIGN	

Under policies of Fidelity Charitable and in accordance with the anti–money laundering regulations applicable to the various financial institutions that provide financial services to Fidelity Charitable, we obtain, record and may verify information that identifies each person who establishes a Giving Account at Fidelity Charitable and other people who contribute to Fidelity Charitable or have access to the Giving Account.

What this means for you: When you establish a Giving Account, we will ask for the name, address, date of birth and other information that will allow us to identify people with access to the Giving Account. We may also ask to see individual driver's licenses or other identifying documents, and we may verify the information we obtain.

Did you sign the form and attach any necessary documents?
Send form and any attachments to Fidelity Charitable.

Questions? Go to FidelityCharitable.org or call 1-800-952-4438.

Fax the form to: 1-877-665-4274

OR

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