



CAPITA
FINANCIAL NETWORK

Fidelity Donor Advised Fund Account Opening Guide

1. <https://www.fidelitycharitable.org/open-account.html>
Use this link to open a new Fidelity Donor Advised Fund.

2. Enter in your information.

FIDELITY Charitable® | Open a Giving Account Help Center

1 > Account holders 2 > Account information 3 > Confirm & submit

First, some information about you

All fields are required unless otherwise noted

	First	Middle	Optional	Last
Full name:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Social security #:	<input type="text"/>			
Date of birth:	<input type="text" value="mm/dd/yyyy"/>			
Mobile number:	<input type="text"/> ?			
Email:	<input type="text"/>			
Address line 1:	<input type="text"/>			
Address line 2:	<input type="text"/>			
Optional				
City:	<input type="text"/>			
State:	<input type="text" value="v"/>	ZIP:	<input type="text"/>	

[+ Add another account holder](#) Optional

Add up to 3 additional account holders (for example, a spouse) who each have full and equal privileges.

Next >

3. Give your Donor Advised Fund a name & name a Successor to your account.

FIDELITY Charitable* | **Open a Giving Account** [Help Center](#)

1 > Account holders 2 > Account information 3 > Confirm & submit

Next, some details about your account

How do you want to be acknowledged?

Giving Account name:

i Example:

This name is seen by charities when you recommend a grant unless anonymity is selected at the time of granting.

Correspondence name:

i Example:

This name is what Fidelity Charitable will use to send grant acknowledgments and account updates.

Name a successor to your account

Your will or estate plan does not cover your Giving Account. We recommend that you name a successor to carry forward your charitable legacy.

You may name a charity as a successor and change your elections online after account opening.

Full name:	First <input type="text"/>	Last <input type="text"/>	Percentage: <input type="text"/> %
	<input type="checkbox"/> Address is the same as primary account holder		i Please allocate a percentage.
Address line 1:	<input type="text"/>		
Address line 2: Optional	<input type="text"/>		
City:	<input type="text"/>		
State:	<input type="text"/> ▼	ZIP:	<input type="text"/>

[+ Add another successor](#)

Total: 0%
Total percentage must equal 100%

4. Authorize Fidelity Charitable to make transfers from your Fidelity Brokerage Account and Accept Term & Conditions.

Do you have a Fidelity brokerage account?

Make contributions directly from your Fidelity brokerage account by agreeing to this one-time electronic Letter of Authorization.

I would like to make contributions from a Fidelity brokerage account.

This Letter of Authorization will ONLY be relied upon when you or your advisor on your behalf provide instructions via the web, paper, or telephone to transfer assets from your Fidelity brokerage account to Fidelity Charitable as charitable contributions. You only need to provide this authorization once. This authorization will be kept on file for future transfers.



Letter of Authorization

By granting this authorization, You (an account owner of a Fidelity brokerage account):

- 1) authorizing National Charitable Services Corp. ("NCS") to accept instructions on behalf of Fidelity Brokerage Services LLC ("FBS") from You and/or your authorized Interested Party/Agent/Advisor ("Your Agent") to transfer cash and securities from your non-retirement brokerage account held at FBS to Fidelity Charitable as a charitable contribution, without requiring additional written instructions from You; and
- 2) understand that NCS shall pass along your instructions to FBS, and that FBS and National Financial Services LLC shall act on such instructions as if they received these instructions directly from you and without further confirmation from you; and
- 3) authorize FBS and NFS to allow NCS access to all of your Fidelity Accounts.
- 4) This authorization shall apply only to non-retirement Fidelity brokerage accounts on which You are registered as an owner ("Fidelity Account"), and in the case of Your Agent, for which Your Agent has been authorized with full trading authority or asset movement authorization level 1 or 2.

This authorization will only be relied upon when You or Your Agent provides contribution instructions to Fidelity Charitable on behalf of FBS. This authorization is subject to additional terms and conditions. Please read these terms and conditions carefully and retain them for your records.

I have read the [terms and conditions](#) and I grant authorization.

Next >

5. Provide your Capita Advisor with your new account number. Capita will then assist with making contributions into your Fidelity Charitable Giving Account.

6. Make grants from your Fidelity Charitable Giving Account to your desired Charity.