

2025 GIVING REPORT

Letter from the president

A Year of Resilience, Innovation, and Impact in Philanthropy

In many ways, 2024 was one of the most phenomenal demonstrations in history of the power of donor-advised fund (DAF) giving. And it was capped by an extraordinary milestone: over \$100 billion in grants to 433,000 unique charitable organizations since our inception. This achievement cements the Fidelity Charitable donors' place in U.S. philanthropic history, showcasing the transformative power of generosity and its ripple effect—building better lives and stronger communities at an unparalleled scale.

This milestone moment was made possible by an unprecedented outpouring of generosity. In 2024 alone, Fidelity Charitable[®] donors made nearly 2.7 million grant recommendations, totaling nearly \$15 billion in support of charitable causes and reaching over 213,000 organizations.

For me, this year was also one of personal gratitude. Hurricanes Helene and Milton caused immense devastation, including in Tennessee, where I was born and raised. Yet, amid the destruction, I witnessed donors step up in profound ways to support their neighbors and communities. Despite the challenges of 2024, donors demonstrated unwavering commitment to the communities and the nonprofits they care about, reminding us of the power of kindness and shared humanity.

Innovation also played a key role in how donors approached giving. In a time of rapid technological advancement, which is reshaping the philanthropy sector as it is every other, Fidelity Charitable[®] and its donors remain at the forefront. Nearly all grants were processed digitally, and donors continued to embrace smarter, more flexible methods to achieve their philanthropic goals. In 2024, Fidelity Charitable also converted significant amounts of non-publicly traded assets, including \$786 million in cryptocurrency contributions, unlocking new opportunities for giving.

As we step into 2025, we carry forward the optimism and gratitude inspired by this past year. With donors continuing to lean into innovative and thoughtful giving, we remain committed to helping them create the greatest possible impact. Together, we can turn generosity into meaningful, lasting change.



Jacob Pruitt President Fidelity Charitable

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Executive summary

Fidelity Charitable's donors continued to break giving records in 2024, using their donor-advised funds to maximize their philanthropy and make an even greater impact on the causes they care about. Since its inception, Fidelity Charitable has helped unlock \$45 billion in additional funds for charitable giving by converting non-publicly traded assets into cash for granting (\$15.5 billion) and investment growth (\$30 billion).

Fidelity Charitable broke all-time records for granting in 2024. Marking a new milestone demonstrating its impact, Fidelity Charitable has now helped donors support more than 433,000 nonprofit organizations, representing nearly one-third of U.S. nonprofits with \$100 billion in grants since its inception.

- In 2024 alone, donors recommended grants totaling \$14.9 billion, representing a 25% year-over-year increase.
- More than 350,000 donors recommended nearly 2.7 million grants.
- Donor-recommended grants in 2024 were five times greater than the amount granted 10 years ago, reinforcing the critical role donor-advised funds (DAFs) play in supporting nonprofits.

As optimism about the economy increased, donors renewed their support for their communities and the organizations they care about most, increasing their granting levels.

- Grants went to a record 213,000 unique nonprofits, both large and small, reaching local, national, and international groups.
- Donors were active in responsive giving, including for natural disasters—with nearly \$50 million in relief granted in response to Hurricanes Helene and Milton alone.

Donor giving patterns were consistent, with donors remaining steadfast to the causes that move them. Across sectors, education, human services, and religion received the most grants. Seventy-seven percent of grants went to charities that donors had previously supported, with over half going to organizations in the donor's home state.

- On average, three-quarters of the dollars that donors contribute to a DAF are granted to nonprofits within five years of receipt.
- Most grants (95%) included the account name or the recommending donors' names and addresses, showing donors' open support for the causes they care about.

Savvy donors continued to leverage appreciated assets to maximize grantmaking to charitable causes in 2024, with increased giving from cryptocurrency.

- In 2024, 67% of contributions to Fidelity Charitable were in the form of non-cash assets, such as stocks.
- Interest in donating cryptocurrency to charity surged in 2024, with digital currency investors seeking to maximize tax benefits and impact. Fidelity Charitable received \$786 million in cryptocurrency donations, a remarkable 14 times increase from 2023. Fidelity Charitable has now taken in more than \$1 billion in cryptocurrency since 2015.
- Contributions of non-publicly traded assets, such as restricted stock, private equity, and limited partnership interests, totaled \$2.3 billion in 2024.

The donor-advised fund

What is a DAF?

JVe

WOld

Grant

0

What if you could maximize your generosity through one simple account? That's the power of the donor-advised fund—or, as we call it at Fidelity Charitable, the Giving Account[®].

A charitable account sponsored by a public charity that donors use to support their charitable giving, the Giving Account[®] makes it easier for donors to plan their giving and be more strategic with the ability to support all of their favorite charities with just one donation. Donors can contribute many types of assets, advise how those assets are invested for growth, and potentially provide even more support to charities over time.



Contributions are invested based on donors' preferences, so the funds have the potential to grow tax-free while they decide which charities to support. At Fidelity Charitable, **donors can recommend an investment strategy that aligns with their goals and time horizons for giving** through investment pools or investment advisor-managed accounts.

Because a Fidelity Charitable Giving Account is a donor-advised fund, donors advise us on granting the money out to their favorite charities. **Donors can support eligible IRS-qualified public charities with the money in their donor-advised funds.** Before making a grant, Fidelity Charitable conducts due diligence on grant recommendations to ensure the funds will be used for charitable purposes.

A record year

Grant growth

In 2024, donors recommended nearly 2.7 million grants totaling \$14.9 billion, representing a 25% year-overyear increase.

As optimism about the economy increased, donors renewed their support for their communities and the causes they care about most, raising their granting levels. Donor-recommended grants in 2024 were five times greater than the amount granted 10 years ago, reinforcing the critical role donor-advised funds play in supporting nonprofits. Additionally, there were 1,971 grants of \$1 million or more—increasing five times from just 350 such grants per year just a decade ago.



"With the incredible acceleration of giving in 2024, donors demonstrated unwavering commitment to the communities and nonprofits they care about, reminding us of the power of kindness and shared humanity."

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- Jacob Pruitt, President of Fidelity Charitable

Giving Account balances



Average grants

Since 2015, the average grant size has grown nearly 30%, from \$4,180 to \$5,422. The average number of grants also grew year over year, from 11.8 in 2023 to 12.3 in 2024.

In total, 88% of Fidelity Charitable donor-advised funds recommended at least one grant in 2024, underscoring donors' consistent commitment to using the Giving Account to support nonprofits.



Engaged and committed donors



A committed and transparent community

Fidelity Charitable donors openly supported the nonprofits that matter to them, with 95% of grants including the account name or the recommending donor's name and address. Only a small percentage of grants were made anonymously.

Information provided by account owners



Included Giving Account name only

Anonymous

¹ Does not include third-party contributors or other third-party individuals.

Donors demonstrated strong loyalty to their favorite charities in 2024, with nearly 4 out of 5 grants supporting causes they had previously funded.

Approximately one-third of these grants were prescheduled, reflecting donors' intentional plans to provide regular, consistent support to these organizations. This kind of sustained and thoughtful support provides nonprofits with crucial stability, allowing them to forecast revenue more accurately, plan programs effectively, and respond to unforeseen challenges with greater confidence.

Grants by type of recommendation



64%



31% Scheduled grant

Nearly 80% of grants went to organizations donors had supported in the past.

.....

of grants were designated "where needed most"

In 2024, 64% of grant recommendations were designated "where needed most," giving nonprofits the flexibility to allocate funds to their most mission-critical priorities.² While donors can direct grants to specific funds or campaigns, the majority opted for unrestricted grants, empowering nonprofits to address their greatest needs.

² While grant recipients must use grants for charitable purposes and in conformity with Fidelity Charitable's policies and applicable laws, special purposes are conveyed to grant recipients as recommendations, not restrictions.

Outstanding impact

Number of unique nonprofits supported

Fidelity Charitable has more than doubled the number of nonprofits supported with donor-recommended grants compared to 10 years ago.

Donors supported nearly 15,000 additional charities in 2024 alone, with grants broadly dispersed across nonprofits of varying sizes, geographic locations, and charitable missions. Since its inception, Fidelity Charitable has facilitated grants to 433,528 unique American charities—representing about one-third of the 1.48 million 501(c)(3) organizations in the U.S.³

Distribution of funds

Fidelity Charitable donors embody the "giving while living" philosophy, consistently and actively recommending grants to charities.

A first-in, first-out analysis of contribution and grant dollars reveals that within five years of a \$100 contribution to Fidelity Charitable, \$74 is granted to charities. After 10 years, \$89 has been granted, with only \$11 remaining to be distributed. This steady and continuous flow of funds underscores the critical support that donor-advised funds provide to the nonprofit sector year after year.



Grant distribution rates



See full data in the appendix

³ SOI Tax Stats, IRS Data Book Table, Internal Revenue Service, 2022.

Moving causes forward

Donors balance urgency and longevity

In 2024, donors demonstrated a strong commitment to long-term giving while responding swiftly to urgent needs.

This agility was evident in the wake of Hurricanes Helene and Milton, which caused over \$50 billion in damage. Donors were active in responsive giving, including to natural disasters, with \$50 million in relief granted in response to those two hurricanes.



Another notable trend was the **continued emphasis on local giving, with more than half of all charitable contributions in 2024 directed to organizations serving donors' home states.** These trends underscore that donors are balancing immediate crises response with sustained local impact, reinforcing the importance of trust, transparency, and innovative approaches to philanthropy.



Granting by charitable sector

Donors maintained steady support for causes year over year, with grant volumes showing consistent patterns. This reflects the intentional and dependable funding approach donors upheld in 2024.

Distribution of grant dollars and volumes, by charitable sector

| Percentage of grant volume | | Charitable Sector | Percen | tage of granting |
|----------------------------|-----|-------------------------|--------|------------------|
| | 27% | Religion | 13% | |
| | 20% | Human services | 13% | |
| | 12% | Education | 23% | |
| | 9% | Health | 8% | |
| _ | 8% | International affairs | 5% | - |
| | 8% | Society benefit | 25% | |
| _ | 8% | Environment and animals | 5% | - |
| | 6% | Arts and culture | 6% | |
| - | 2% | Other | 2% | • |

See full data in the appendix



Innovative approaches for good

Amplifying philanthropy through impact investing

As donors increasingly seek innovative ways to achieve impact beyond traditional philanthropic giving, new approaches have gained significant traction.

Fidelity Charitable donors are able to participate in impact investing in a variety of ways, including by investing charitable funds in the Giving Account in options aligned with their values, as well as by putting funds to work directly in the social sector via recoverable grants and grants to impact investing nonprofits. Participation in these strategies has grown rapidly, with the amount invested for impact doubling in the past five years and grants to impact-investing nonprofits tripling over the same period.

Impact investing

By selecting investment options, including five impactinvesting pools, aligned with their values, donors can ensure that funds invested in the Giving Account are also working toward their desired outcomes. The amount invested for impact has doubled over the past five years.

Amount invested for impact





Grants to impact-investing nonprofits

Grants to impact-investing nonprofits have experienced remarkable growth, doubling in the past five years.

These innovative 501(c)(3) organizations often support social enterprises, microfinance initiatives, and community development efforts—such as addressing the shortage of low-income housing. When donors recommend grants to impact-investing nonprofits, they leverage traditional philanthropy to support these organizations' unique missions. Importantly, the returns generated by these nonprofits from their projects are often recycled to fund future investments, multiplying the impact of the initial grant and enabling sustainable social change.



Recoverable grants

In 2024, donors recommended nearly \$11 million in recoverable grants, helping nonprofits execute critical projects while ensuring the funds remain available for future charitable endeavors.

Recoverable grants allow nonprofits to use funds to support specific goals before returning the funds to Fidelity Charitable for future grantmaking. For example, a recoverable grant could provide the upfront capital for a nonprofit's social enterprise initiative, such as launching a job training program where the organization generates revenue by providing services or selling goods. Once the program reaches its revenue goals, the grant funds can be repaid and redistributed to support other philanthropic efforts.

Total recoverable grant dollars

\$69.5M

Lifetime

\$13M 2020

\$10.8M 2024

Total impact-investing support to nonprofits

In 2023, Fidelity Charitable announced its commitment to double the total amount of impact-investing support to nonprofits through recoverable grants and grants to impact-investing nonprofits—from \$500 million to \$1 billion in five years.



\$687M as of December 31, 2024

\$537M as of December 31, 2023

Amplifying corporate giving impact

The corporate donor-advised fund

In 2024, the Fidelity Charitable Corporate Giving Account helped more than 500 companies distribute over \$500 million in charitable contributions, supporting impactful causes and communities.

Similar to the Fidelity Charitable Giving Account designed for individual and family philanthropy, the Corporate Giving Account enables companies to maximize the impact of their charitable dollars. It serves as an excellent alternative or complement to a corporate foundation, offering streamlined administration and greater flexibility compared to traditional giving methods. This tool empowers companies to manage their philanthropy more efficiently while making a meaningful difference.

518 Total number of Fidelity Charitable corporate donor-advised funds

48

Average number of grants per Corporate Giving Account

| Grant activity | 2023 | 2024 |
|----------------|----------|----------|
| Total dollars | \$237M | \$525M |
| Total volume | 22,930 | 24,975 |
| Average amount | \$10,318 | \$21,024 |

In 2024, human service-related charities were most frequently supported by Corporate Giving Account users, followed by health and education charities in near-equal amounts.

Corporate granting by sector

| Sector | Volume | Percentage of total grants |
|-------------------------|--------|----------------------------|
| Human services | 8,019 | 32% |
| Health | 3,362 | 14% |
| Education | 3,456 | 14% |
| Society benefit | 3,141 | 13% |
| Religion | 2,571 | 10% |
| Environment and animals | 1,843 | 7% |
| International affairs | 1,066 | 4% |
| Arts and culture | 1,021 | 4% |
| Other | 496 | 2% |

Spotlight

Companies using the Corporate Giving Account are also leveraging the Gift4Giving® program as part of their employee recognition efforts. This program celebrates milestones and achievements by empowering employees to support their favorite causes using the company's donoradvised fund. In 2024, nearly 2,200 Gift4Giving® eGifts, totaling almost \$800,000, were distributed—allowing employees and others to recommend grants to causes they care about while reinforcing a culture of generosity.

Making more of a difference

Investment growth

Fidelity Charitable investment growth has generated nearly \$30 billion in additional funds for charitable causes.

After donors make irrevocable contributions, the assets in their Giving Account can be invested and grow tax-free while they decide where to recommend contributions. Donors can choose from a variety of investment options that align with their charitable goals and time frames. These options include Fidelity Charitable investment pools, which range from lower to higher equity allocation mixes, or an investment advisor-managed account for a more tailored strategy. The growth generated through these investments provides donors with additional charitable dollars to support nonprofits.



See full data in the appendix

Types of funding

While most charitable contributions in the United States are made using cash, checks, or credit cards, twothirds of contributions to Fidelity Charitable come in the form of strategic non-cash assets.

Donating long-term appreciated securities directly to charity allows donors to potentially eliminate capital gains taxes on the appreciation, enabling them to give more than if they sold the assets and donated the proceeds. These tax savings create an additional source of funding for charitable causes. Fidelity Charitable accepts a wide range of assets, including publicly traded securities such as stocks, bonds, and mutual funds, as well as non-publicly traded assets like private stock, restricted stock, and limited partnership interests—providing donors with greater flexibility to maximize their impact.

Percentage of asset types contributed in 2024, by dollars



Non-publicly traded assets

Since its inception, Fidelity Charitable has converted nearly \$15.5 billion of non-publicly traded assets into dollars for charity, transforming a significant but often overlooked source of wealth into impactful philanthropic funding.

Non-publicly traded assets, such as private stock, limited partnership interests, and cryptocurrency, represent a large share of wealth in the United States but are often underutilized in charitable giving. These assets can be complex for individuals to donate and challenging for many nonprofits to accept. Fidelity Charitable plays a critical role in facilitating these contributions, leveraging in-house expertise to convert complex assets into cash available for granting—while often helping donors minimize their tax burden.

In addition, Fidelity Charitable's ability to accept cryptocurrency donations provides a unique advantage. By donating digital assets directly, donors can potentially eliminate capital gains taxes on highly appreciated cryptocurrency. In 2024, donors contributed 14 times more cryptocurrency than in 2023, totaling \$786 million. This brought the total value of cryptocurrency contributions to Fidelity Charitable to over \$1 billion since it began accepting these assets in 2015, further unlocking the potential of this innovative form of giving.

Non-publicly traded asset contributions, by dollars



How Fidelity Charitable supports a strong sector

Fidelity Charitable is committed to strengthening the entire philanthropic sector through smarter philanthropy. Here are just some of the ways we're working tirelessly to make charitable giving accessible, simple, and effective.

Sharing valuable resources

- **Expertise:** Through our advisor Practice Management & Consulting program and our regional network of Charitable Planning Consultants, we provide educational opportunities and one-on-one consulting support for financial advisors who serve philanthropic clients.
- **Resources:** We provide robust, publicly available resources to help donors give thoughtfully and effectively at www.FidelityCharitable.org. These include educational events, webinars, tools, and tools such as calculators, as well as real-time guidance for giving during natural disasters or humanitarian crises.

Driving innovation in philanthropy

- Supporting nonprofit efficiency: Electronic funds transfers (EFTs) are nine times faster than traditional channels—and a safer way for organizations to receive funds. Today, over 58% of our grants are now distributed via EFT, enabling more than 750,000 grants to reach nonprofits faster and more securely than with traditional check processing.
- Digital savvy: We are committed to a seamless donor experience and continue to promote easier, safer, and more sustainable ways for donors to give. Last year, most grant recommendations—98%— were initiated digitally. Representing a 17% increase year over year, nearly 60,000 grants were initiated through our iOS app, putting grantmaking at our donors' fingertips.

Increasing impact for the sector

- Invested in impact: In 2023, Fidelity Charitable announced its commitment to double the total amount of impact-investing support to nonprofits through recoverable grants and grants to impactinvesting nonprofits—from \$500 million to \$1 billion by 2028. To date, we've achieved 75% of our goal, reaching \$687.5 million.
- **Catalyst Fund:** Separate from our donor-advised fund, the Fidelity Charitable Catalyst Fund is a grantmaking program of our Board of Trustees that aims to connect donors to promising nonprofits and increase funding for the critical organizations that strengthen communities. In 2024, the fund provided 42 grants worth over \$14 million.

Growing and unlocking capital for good

Since inception, \$15.5 billion in non-publicly traded assets have been converted and nearly \$30 billion has been made available for granting through tax-free investment growth—that's more than \$45 billion in additional funds for charity over the lifetime of our organization.

Methodology

The majority of data for this report was obtained from Fidelity Charitable's internal reporting database. Other sources, data, and figures are cited throughout the report. The report looks at Fidelity Charitable activity in calendar year 2024 and includes results from prior calendar years to show trends. Where figures represent a snapshot in time, values are as of December 31, 2024 (and prior calendar year-ends). For example, when we say that Fidelity Charitable has 217,402 donor-advised funds in total, that number represents a snapshot of funded accounts at year-end 2024, and it is understood that the count naturally fluctuated throughout the year.

Throughout the report, "donor" refers to the primary account holder or the primary corporate contact connected to the Giving Account. Every Giving Account has one person designated as the primary account holder (or, in the case of corporate accounts, the primary corporate contact), although each Giving Account may have more than one account holder (i.e., person with advisory privileges, including the ability to recommend grants) associated with it. The exceptions to the use of "donor" solely in reference to the primary account holder on a Giving Account are the total-donor statistics on page 8, which include all account holders (primary and sometimes multiple secondary) and all corporate contacts (primary and sometimes multiple secondary). In this report, the term "donor" does not refer to any third-party individuals.

One outlier grant of \$430 million was removed from calculations for the average grant size on page 7.

The specific analysis conducted for the chart on page 10 reviews granting of contribution dollars using a first-in, first-out methodology. The analysis reviewed donor contributions each year and then looked at grant recommendations associated with these contributions in subsequent years. A limited number of accounts with significant transfer activity were excluded from the analysis.

The cumulative investment growth analysis conducted for the chart on page 16 was calculated by subtracting the total Fidelity Charitable net contributions since inception from the total of Giving Account balances. Numbers are as of December 31 of each year. Starting in 2019, assets include adjustments for contributions received by December 31 but settled after December 31. Historical results have been adjusted accordingly.

Appendix

A record year

| Number of donors and DAFs20152024Number of donors132,190352,052Number of Fidelity Charitable donor-advised funds80,152217,402Information provided by account owners80%11Included Giving Account name only15%80%Anonymous5%5%Grants by type of recommendation23%New grant23%Scheduled grant31%Designated "where needed most"64%Outstanding impact20152024Nonprofits20152024Number of charities supported106,249213,476Grant distribution rates\$39\$74Vithin 1 year of a \$100 contribution\$39\$741 years after a \$100 contribution\$74\$741 years after a \$100 contribution\$74\$74 | Grant growth | 2015 | | 202 | 24 |
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| Number of donors and DAFs20152024Number of donors132,190352,052Number of Fidelity Charitable donor-advised funds80,152217,402Information provided by account owners80%115%Included Goring Account name only15%80%Included Giving Account name only15%Anonymous5%Grants by type of recommendation23%New grant23%Regrant46%Scheduled grant31%Designated "where needed most"64%Outstanding impact2015Number of charities supported106,249Vithin 1 year of a \$100 contribution\$395 years after a \$100 contribution\$395 years after a \$100 contribution\$395 years after a \$100 contribution\$89Moving causes forward889Balancing urgency and longevity\$50M | Average grant size | | | \$4,180 | \$5,422 |
| Number of donors132,190352,052Number of Fidelity Charitable donor-advised funds80,152217,402Information provided by account owners80%1Included donor name and address80%1Included Giving Account name only15%Anonymous5%Grants by type of recommendation23%New grant23%Regrant46%Scheduled grant31%Designated "where needed most"64%Outstanding impact2015Number of charities supported106,249Vithin 1 year of a \$100 contribution\$395 years after a \$100 contribution\$305 years after a \$100 contribution\$305 years after a \$100 contribution\$30 <t< td=""><td>Engaged and committed donors</td><td></td><td></td><td></td><td></td></t<> | Engaged and committed donors | | | | |
| Number of Fidelity Charitable donor-advised funds80,152217,402Information provided by account owners80%Included donor name and address80%Included Giving Account name only15%Anonymous5%Grants by type of recommendation23%Regrant46%Scheduled grant31%Designated "where needed most"64%Outstanding impact2015Nonprofits2015Nonprofits2024Number of charities supported106,249213,476395 years after a \$100 contribution\$395 years after a \$100 contribution\$39Sovar after a \$100 contribution\$39Sovar after a \$100 contribution\$39Grait gurgency and longevity\$50M | Number of donors and DAFs | | | 2015 | 2024 |
| Information provided by account owners Included donor name and address Included Giving Account name only Included Giving Include Included Giving Include Included Giving Include Include Giving Include Incl | Number of donors | | | 132,190 | 352,052 |
| Included donor name and address80%Included Giving Account name only15%Anonymous5%Grants by type of recommendation5%New grant23%Regrant46%Scheduled grant31%Designated "where needed most"64%Outstanding impact2015Number of charities supported106,249Quits after a \$100 contribution\$395 years after a \$100 contribution\$395 years after a \$100 contribution\$89Moving causes forward Balancing urgency and longevity\$50M | Number of Fidelity Charitable donor-advised funds | | | 80,152 | 217,402 |
| Included donor name and address80%Included Giving Account name only15%Anonymous5%Grants by type of recommendation5%New grant23%Regrant46%Scheduled grant31%Designated "where needed most"64%Outstanding impact2015Number of charities supported106,249Quits after a \$100 contribution\$395 years after a \$100 contribution\$395 years after a \$100 contribution\$89Moving causes forward Balancing urgency and longevity\$50M | Information provided by account owners | | | | |
| Anonymous5%Grants by type of recommendation23%New grant23%Regrant46%Scheduled grant31%Designated "where needed most"64%Outstanding impact20152024Nonprofits20152024Number of charities supported106,249213,476Grant distribution rates\$39\$395 years after a \$100 contribution\$395 years after a \$100 contribution\$395 years after a \$100 contribution\$89Moving causes forward Balancing urgency and longevity\$50M | | | | • • • • • • • • • • • • • • • • • • • • | 80% |
| Grants by type of recommendation 23% New grant 23% Regrant 46% Scheduled grant 31% Designated "where needed most" 64% Outstanding impact 64% Nonprofits 2015 2024 Number of charities supported 106,249 213,476 Grant distribution rates 319 5 years after a \$100 contribution \$39 \$39 5 years after a \$100 contribution \$74 10 years after a \$100 contribution Moving causes forward \$89 \$89 Moving causes forward Balancing urgency and longevity \$50M | Included Giving Account name only | | | | 15% |
| New grant23%Regrant46%Scheduled grant31%Designated "where needed most"64%Outstanding impact2015Nonprofits2015Number of charities supported106,249Quistinibution rates106,249Within 1 year of a \$100 contribution\$395 years after a \$100 contribution\$7410 years after a \$100 contribution\$89Moving causes forward\$89Balancing urgency and longevity\$50M | Anonymous | | | | 5% |
| Regrant46%Scheduled grant31%Designated "where needed most"64%Outstanding impact64%Nonprofits2015Number of charities supported106,249Quitsiand distribution rates106,249Within 1 year of a \$100 contribution\$395 years after a \$100 contribution\$50Moving causes forward\$50MBalancing urgency and longevity\$50M | Grants by type of recommendation | | | | |
| Scheduled grant31%Designated "where needed most"64%Outstanding impact2015Nonprofits2015Number of charities supported106,249Grant distribution rates106,249Within 1 year of a \$100 contribution\$395 years after a \$100 contribution\$7410 years after a \$100 contribution\$89Moving causes forward\$89Balancing urgency and longevity\$50M | New grant | | | • • • • • • • • • • • • • • • • • • • • | 23% |
| Scheduled grant31%Designated "where needed most"64%Outstanding impact2015Nonprofits2015Number of charities supported106,249Grant distribution rates106,249Within 1 year of a \$100 contribution\$395 years after a \$100 contribution\$7410 years after a \$100 contribution\$89Moving causes forward\$89Balancing urgency and longevity\$50M | Regrant | | | | 46% |
| Outstanding impact20152024Nonprofits20152024Number of charities supported106,249213,476Grant distribution rates395Within 1 year of a \$100 contribution\$39\$745 years after a \$100 contribution\$74\$89Moving causes forward\$89\$89Balancing urgency and longevity\$50M | Scheduled grant | | | | 31% |
| Nonprofits20152024Number of charities supported106,249213,476Grant distribution rates\$39Within 1 year of a \$100 contribution\$395 years after a \$100 contribution\$7410 years after a \$100 contribution\$89Moving causes forward Balancing urgency and longevity\$50M | Designated "where needed most" | | | | 64% |
| Nonprofits20152024Number of charities supported106,249213,476Grant distribution rates\$39Within 1 year of a \$100 contribution\$395 years after a \$100 contribution\$7410 years after a \$100 contribution\$89Moving causes forward Balancing urgency and longevity\$50M | Outstanding impact | | | | |
| Number of charities supported106,249213,476Grant distribution rates106,249213,476Within 1 year of a \$100 contribution\$39\$395 years after a \$100 contribution\$74\$7410 years after a \$100 contribution\$89\$89Moving causes forward Balancing urgency and longevity\$50M | | | | 2015 | 2024 |
| Grant distribution rates \$39 Within 1 year of a \$100 contribution \$39 5 years after a \$100 contribution \$74 10 years after a \$100 contribution \$89 Moving causes forward \$89 Balancing urgency and longevity \$50M | | •••••• | | • • • • • • • • • • • • • • • • • • • • | |
| Within 1 year of a \$100 contribution\$395 years after a \$100 contribution\$7410 years after a \$100 contribution\$89Moving causes forward Balancing urgency and longevity\$50M | | | | 100,247 | 213,470 |
| 5 years after a \$100 contribution \$74 10 years after a \$100 contribution \$89 Moving causes forward Balancing urgency and longevity Giving to Hurricanes Helene and Milton \$50M | ••••••••••••••••••••••••••••••••••••••• | | | | |
| 10 years after a \$100 contribution \$89 Moving causes forward Balancing urgency and longevity Giving to Hurricanes Helene and Milton \$50M | | | | | |
| Moving causes forward Balancing urgency and longevity Giving to Hurricanes Helene and Milton \$50M | | | | | |
| Balancing urgency and longevity Giving to Hurricanes Helene and Milton \$50M | TO YEARS ALLEF A \$100 CONTRIDUCTION | | | | φάλ |
| Giving to Hurricanes Helene and Milton \$50M | Moving causes forward | | | | |
| | Balancing urgency and longevity | | | | |
| | Giving to Hurricanes Helene and Milton | | | ••••••••••••••••••••••••••••••••••••••• | \$50M |
| | - | ate | | | |

| Deligion | percentage of grant volumes | perce | entage of gra | ant dollars |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|-----------------------------------------------|-------------------------------|-----------------------------------------------------------------------|
| Religion | 27% | | 13% | |
| Human services | 20% | | 13% | |
| Education | 12% | | 23% | |
| Health | 9% | | 8% | |
| International affairs | 8% | | 5% | |
| Society benefit | 8% | | 25% | |
| Environment and animals | 8% | | 5% | |
| Arts and culture | 6% | 6% | | |
| Other | 2% | | 2% | |
| nnovative approaches for good | | | | |
| Impact investing | | | 2015 | 2024 |
| Amount invested for impact | | ••••• | \$2.3B | \$4.6B |
| - | | 2020 | 2024 | Tifatima |
| Grant dollars and volumes to impact-investing | nonpronts | 2020 | 2024 | Lifetime |
| Grant dollars | | \$70M | \$138M | \$618M |
| Grant volumes | | 6,454 | 7,160 | 69,307 |
| Recoverable grants | | 2020 | 2024 | Lifetime |
| Total recoverable grant dollars | | \$13M | \$10.8M | \$69.5M |
| Impact-investing nonprofits | 0.25 | f December 3 | 1 2024 | 2028 goal |
| Total impact-investing support to nonprofits | ao 0. | \$687.5M | | \$1B |
| | | φ007.511 | | ψīD |
| Amplifying corporate giving impact | | | | |
| Corporate DAFs | | | | |
| Total number of Fidelity Charitable corporate do | nor-advised funds | | | 518 |
| Average number of grants per Corporate Giving | Account | | | 48 |
| Corporate grant activity | | 2023 | | 2024 |
| Total dollars | | \$236,597,290 | \$! | 525,063,123 |
| Total volume | | 22,930 | | 24,975 |
| Average amount | | \$10,318 | | \$21,024 |
| Corporate granting volumes, by sector | | Volume | | % of total |
| Human services | | 8,019 | | 32% |
| Health | | 3,362 | | 14% |
| Education | | 3,456 | | 14% |
| Society henefit | | 3,141 | | 13% |
| | | 0 5 5 4 | | |
| Religion | | 2,571 | | 10% |
| Religion Environment and animals | | 1,843 | | 10% 7% |
| Religion Environment and animals International affairs | | 1,843 1,066 | | 10% 7% 4% |
| Religion Environment and animals International affairs Arts and culture | | 1,843 1,066 1,021 | | 10% 7% 4% 4% |
| Religion Environment and animals International affairs Arts and culture | | 1,843 1,066 | | 10% 7% 4% |
| Society benefit Religion Environment and animals International affairs Arts and culture Other Making more of a difference | | 1,843 1,066 1,021 | | 10% 7% 4% 4% |
| Religion Environment and animals International affairs Arts and culture Other Making more of a difference | | 1,843 1,066 1,021 496 | | 10% 7% 4% 4% 2% |
| Religion Environment and animals International affairs Arts and culture Other Making more of a difference Investment growth, by year | | 1,843 1,066 1,021 496 2015 | | 10% 7% 4% 4% 2% 2024 |
| Religion Environment and animals International affairs Arts and culture Other Making more of a difference Investment growth, by year Growth | hy dollars | 1,843 1,066 1,021 496 | | 10% 7% 4% 4% 2% |
| Religion Environment and animals International affairs Arts and culture Other Making more of a difference Investment growth, by year Growth Percentage of asset types contributed in 2024, 1 | by dollars | 1,843 1,066 1,021 496 2015 | | 10% 7% 4% 2% 2% 2024 \$29.9B |
| Religion Environment and animals International affairs Arts and culture Other Making more of a difference Investment growth, by year Growth Percentage of asset types contributed in 2024 , 1 Cash | by dollars | 1,843 1,066 1,021 496 2015 | | 10% 7% 4% 2% 2% 2024 \$29.9B |
| Religion Environment and animals International affairs Arts and culture Other Making more of a difference Investment growth, by year Growth Percentage of asset types contributed in 2024, I Cash Non-publicly traded assets | by dollars | 1,843 1,066 1,021 496 2015 | | 10% 7% 4% 2% 2% 2024 \$29.9B 33% 10% |
| Religion Environment and animals International affairs Arts and culture Other Making more of a difference Investment growth, by year Growth Percentage of asset types contributed in 2024, I Cash Non-publicly traded assets | by dollars | 1,843 1,066 1,021 496 2015 | | 10% 7% 4% 2% 2% 2024 \$29.9B |
| Religion Environment and animals International affairs Arts and culture Other Making more of a difference Investment growth, by year Growth Percentage of asset types contributed in 2024, I Cash Non-publicly traded assets Publicly traded assets | by dollars | 1,843 1,066 1,021 496 2015 | 2015 | 10% 7% 4% 2% 2% 2024 \$29.9B 33% 10% |
| Religion Environment and animals International affairs Arts and culture Other Making more of a difference Investment growth, by year Growth Percentage of asset types contributed in 2024, I Cash Non-publicly traded assets Publicly traded assets Non-publicly traded assets | | 1,843 1,066 1,021 496 2015 | 2015 \$629M | 10% 7% 4% 2% 2% 2024 \$29.9B 33% 10% 57% |
| Religion Environment and animals International affairs Arts and culture Other | | 1,843 1,066 1,021 496 2015 | • • • • • • • • • • • • • • • | 10% 7% 4% 2% 2024 \$29.9B 33% 10% 57% 2024 |

About Fidelity Charitable

Fidelity Charitable is an independent public charity that has helped donors support more than 433,000 nonprofit organizations with nearly \$100 billion in grants. Established in 1991, Fidelity Charitable launched the first national donor-advised fund program. The mission of the organization is to grow the American tradition of philanthropy by providing programs that make charitable giving accessible, simple, and effective.

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