

FIDELITY PRIVATE FOUNDATION SERVICES **Application**

Completing this form will initiate the account establishment process with Fidelity Private Foundation Services. Upon receipt of this form, a Client Service Manager will contact you to continue the establishment of your account with Fidelity Private Foundation Services.

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FOUNDATION CONTACT INFORMATION AND MAILING ADDRESS

Please provide the following information for the Foundation and the primary contact. The primary contact is the person who will receive all correspondence from Fidelity Private Foundation Services.

Foundation Name (If Existing):

Primary Contact:

Mailing Address:

Daytime Telephone Number:

Evening Telephone Number:

Fax Number:

Email Address:

Foundation Web Site Address (If Existing):

ADVISOR INFORMATION

When establishing a foundation, an attorney must be involved in order to draft the necessary documentation. Please provide the following information for the attorney you are working with on your Foundation. If you currently are not working with an attorney and would like to select one referred by Fidelity Investments®, contact a Client Service Manager at the number below.

Advisor Name:

Firm Name:

Mailing Address:

Daytime Telephone Number:

Fax Number:

Email Address:

Would you like us to work with you or your attorney/advisor on the Foundation? ME MY ADVISOR

Would you like your attorney/advisor to receive duplicate statements including monthly and annual statements?

YES NO

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2 EXISTING FOUNDATION

Please complete the information below if you are converting an existing foundation to Fidelity Private Foundation Services.

Is the Foundation a Corporation or a Trust? CORPORATION TRUST

When was the Foundation established? (month/day/year/) / /

In which state was the Foundation established?

What is the Foundation's Tax ID number?

When is the Foundation's fiscal year-end? (month)

Is the Foundation using a cash or accrual accounting method? CASH ACCRUAL

In order to help facilitate your application, please forward copies of the following documents:

- Foundation by-laws
- Foundation tax forms for the prior 5 years, if applicable
- Determination letter
- Form 1023 status if Determination letter has not been issued

3 SIGNATURE

Signature: _____

Date: / /

If you have any questions regarding this form, please call us at **800.334.4438**
Monday through Friday between 8:30 a.m. and 5:30 p.m. ET.

Please mail or fax completed form to:

Fidelity Private Foundation Services

P.O. Box 55158

Boston, Massachusetts 02210

fax: **617.385.1299**

(If faxing this form, please do not mail the original.)

Overnight address:

Fidelity Private Foundation Services

200 Seaport Blvd., Mailzone ZE7

Boston, Massachusetts 02205-5158

For further information regarding the suitability of a private foundation as part of your estate plan or your overall income tax planning, or the availability of certain federal or state income tax deductions resulting from contributions made to establish any private foundation, please consult your tax advisor.

Fidelity Private Foundation Services offers an easy and flexible way to establish and manage a private foundation. Various Fidelity companies provide administrative services to Fidelity Private Foundation Services.

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