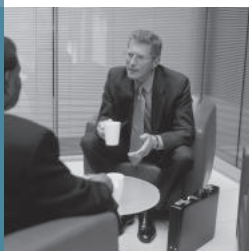


Life Stage/Personal Situation



Client Clue	Discussion Segue	Cues and Clues (detailed examples*):
<ul style="list-style-type: none"> • Receipt of inheritance • Recent birth of a grandchild • Change in family status • Employed in high-income profession • Participant in IPO/merger/acquisition 	<ul style="list-style-type: none"> • Have you thought about how this event (e.g., inheritance, birth) will affect your financial plan? • Have you thought about making charitable giving part of your financial plan? • How do you currently give to charities? How much? How often? • Would you like to establish a tradition of charitable giving for your family? • What personal values would you like to instill in your family? • Have you thought of a charitable giving strategy to help you reach these goals? 	<p>SAMPLE #1: FAMILY GIVING Congratulations on your new grandchild. Have you thought at all about how to begin a family tradition of charitable giving and involve your grandchildren at a young age?</p> <p>SAMPLE #2: FINANCIAL PLANNING Given your high income, have you thought about integrating charitable giving into your overall financial plan?</p>

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*These sample dialogues are to be used as a basis for you to develop your own communication style with clients. These samples are not to be used as scripts—they should not be presented verbatim to clients/prospects.

At all times you should note that rules regarding tax deductions for charitable giving vary at the state level. Tax deductions discussed herein refer specifically to federal taxes.

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