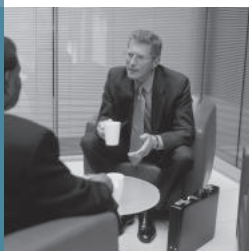


Philanthropic Activity



Client Clue	Discussion Segue	Cues and Clues (detailed examples*):
<ul style="list-style-type: none"> • Directly gives \$5,000+ annually to charity • Gives stock directly to charities/completes LOIs • Strong civic or community involvement • Finds administrative aspects of giving cumbersome • Has or desires a Private Family Foundation • Practices annual tithing • Makes small contributions to multiple charities each year 	<ul style="list-style-type: none"> • How have you integrated “charitable giving” into your financial plans? • Let’s talk about ways to make it easier for you to donate appreciated securities to your favorite charities. • Have you thought about ways to simplify your charitable giving? • Do you have concerns about the privacy of your charitable giving? • What events in your past do you attribute to your current success? • Did you know the Pension Protection Act changed the receipt rules making it administratively more complex to make small contributions to charities? 	<p>SAMPLE #1: LETTER OF INSTRUCTION I see you have a Letter of Instruction (LOI) to transfer stock directly to charity. Did you know we have a couple of different solutions that might facilitate charitable giving?</p> <p>SAMPLE #2: RECORDKEEPING Is it cumbersome for you to keep track of all your receipts for your charitable giving? Did you know we have a couple of solutions that might facilitate your charitable contributions?</p>

For more information on Fidelity Charitable Services,[®] call 1.800.280.6357
or visit www.fidelitycharitable.com.
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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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