



## FIDELITY PHILANTHROPIC CONSULTING

# Giving Road Map

Giving back can be one of life’s most rewarding experiences. Effective philanthropy has the power to strengthen family ties, fulfill a meaningful legacy, and inspire the next generation. The causes you and your family care about are deeply personal—rooted in your values, beliefs, and experiences. Our Fidelity Philanthropic Consulting (FPC) team of advisors can help you and your family find focus, meaning, and joy through giving and ensure you are supporting impactful organizations.

### WHAT IT IS

Fidelity Philanthropic Consulting’s (FPC’s) Giving Road Map helps you clarify and articulate your values, mission, strategy, and approach to achieving your philanthropic goals, and identifies impactful organizations and networks. FPC can also engage family members to involve them in your long-term giving plan.

### HOW IT WORKS

- Clarify:** FPC meets with you to clarify your values, goals, mission, strategy, budget, and approaches to giving. (2 hours)
- Identify:** FPC identifies impactful organizations, philanthropic networks, and collaboratives that align with your values and philanthropic goals. (6 organizations)
- Solidify:** FPC meets with family members to create more meaningful experiences. (4 family members total)

### WHAT WE DELIVER

- Tools and worksheets to facilitate exploration of your philanthropic values, goals, mission, strategy, and approaches to giving
- A report of nonprofit organizations, philanthropic networks/collaboratives
- A customized philanthropy plan

### CLARIFY

**FPC will learn about your:**

- Goals, values, mission, and current giving strategy
- Past experience giving and volunteering
- Budget/resources



### IDENTIFY

**FPC will research:**

- Impactful organizations that align with your values and goals
- Philanthropic networks and collaboratives to accelerate your impact

### SOLIDIFY

**FPC meets with family members to:**

- Learn about their values and cause areas
- Identify common interests/themes
- Create a giving plan and process to magnify your impact

**Cost: \$10,000\* | Timeline: 6 weeks**

*\*Certain services can be paid through a donor-advised fund or private foundation.*

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To learn more, please contact us at [PhilConsulting@fmr.com](mailto:PhilConsulting@fmr.com).