

FIDELITY WEALTH MANAGEMENT **WEBINAR**

Coming together through giving

February 2, 2022



Our Speakers



Ally Donnelly
Director, Editorial, Fidelity Investments

Ally Donnelly is a new member of the Fidelity family, having joined in 2021 as an Editorial Director. Her work focuses on communicating with our clients through innovative video and audio content. Prior to joining our team, she was a long-time broadcast television journalist for NBC and NECN in Boston. Her work has been recognized with multiple Edward R. Murrow, Emmy, Associated Press, and Gabriel awards throughout New England. Outside of work, Ally loves traveling and exploring the great outdoors with her family. She and her husband are raising their two beautiful daughters (and one wacky dog) on Boston's South Shore.



Rebecca Miller
Director, Philanthropic Strategies, Fidelity Charitable®

Rebecca Miller is a philanthropic strategist for the Private Donor Group at Fidelity Charitable®, an independent public charity that has helped donors support more than 300,000 nonprofit organizations with \$42 billion in grants. Ms. Miller assumed her current role in 2020. As a philanthropic strategist, she is responsible for providing Fidelity Charitable's most generous donors with guidance, insight, and solutions to meet their philanthropic goals. She uses her knowledge of international and domestic grantmaking to help donors find innovative strategies to maximize their charitable giving, including with their Fidelity Charitable donor-advised fund.



Marshall Baker, CFP®
VP, Wealth Management Advisor, Fidelity Investments

As a Wealth Management Advisor*, Marshall helps multi-generational families create a comprehensive set of personalized wealth strategies designed for the growth, preservation, and transfer of their wealth. He coordinates the input and involvement of a team of specialists, including investment managers, advanced planners, trust officers, and other Fidelity specialists, to help with wealth management strategies. Outside of work and family time, you'll find him running steep trails, cycling, skiing, and surfing.

Value Cards



Picture Your Legacy® [21/64, Inc.](#)



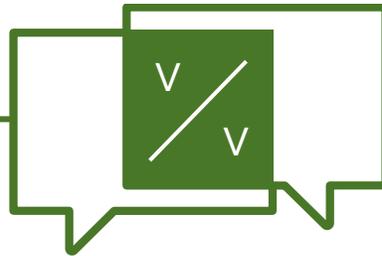
Motivational Values™ [21/64, Inc.](#)

Rules of Thumb

“Whose *voice* do we need to hear in this decision, and how should we think about the *vote*?”

VOICE

Engages the voice of impacted people



VOTE

Clarifies the decision-making vote



Fidelity Viewpoints® article:
5 family engagement rules

Why should I use it?

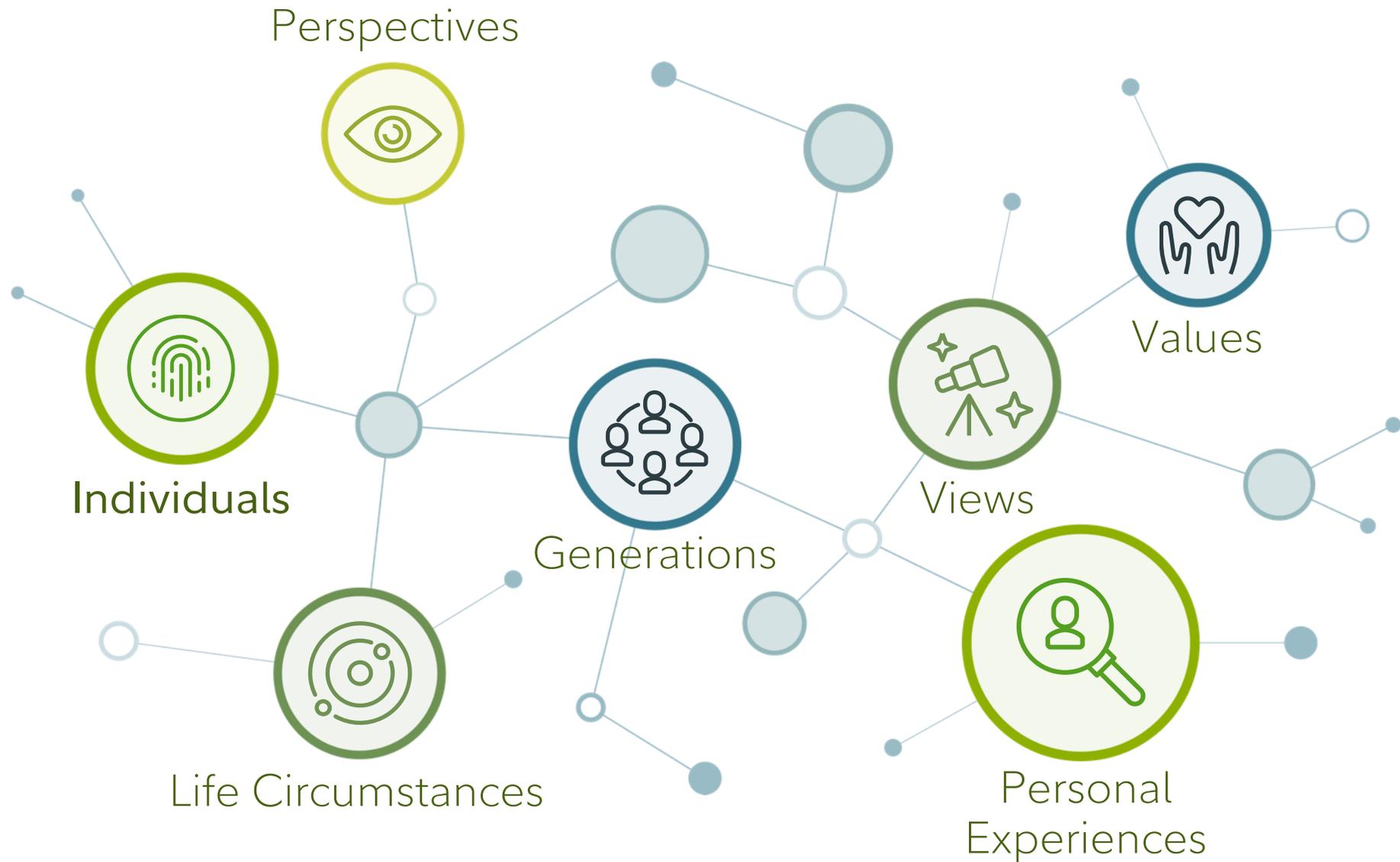
- Addresses the fear of giving others a *voice* or relinquishing the *vote*
- Breaks generational silence
- Engages and empowers unengaged family members
- Shares the burden of decision-making

How should I use it?

Ask yourself: “Is there a need to involve my grandchildren’s parents in this decision? How might it impact their lives?”

Say: “How do you see this money impacting your life?” or “What would you do if you were in my position?”

A Family is a System of Interconnected Parts



Fidelity Charitable: The Future of Philanthropy



"I consider myself a philanthropist."



Millennials



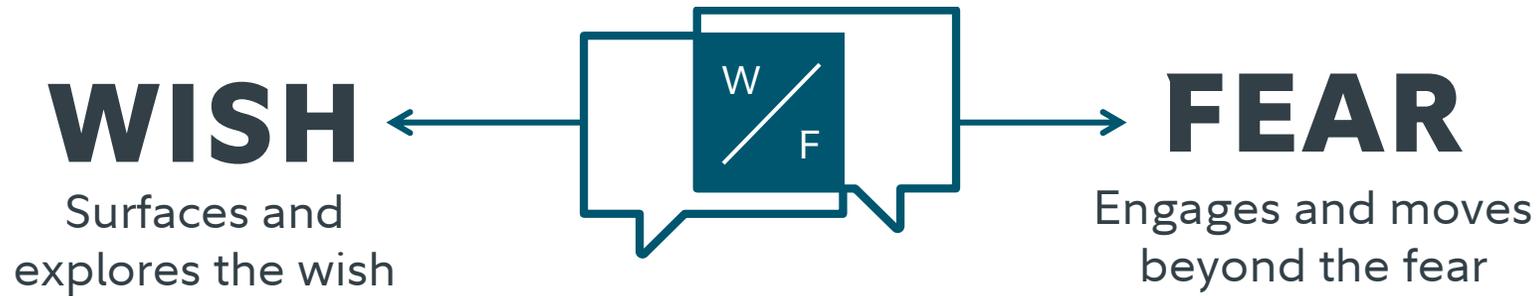
Gen Xers



Baby
Boomers

Rules of Thumb

“What wishes are important to our planning and what fears might we default to?”



Fidelity Viewpoints® article:
5 family engagement rules

Why should I use it?

- Steps out of *fear* and seeks the *wish*
- Moves beyond goals
- Creates understanding
- Facilitates planning outcomes
- Engages in the complexity

How should I use it?

Ask yourself: “What are my fears?” and “What are my wishes?” and “What am I truly trying to accomplish with my actions?”

Say: “How would a lump sum of money (e.g., \$50,000) impact your life?” or “What are some of your greatest needs at the moment?”

Resources for Charitable Giving Across Generations



A screenshot of the Fidelity Charitable website. The header includes the Fidelity Charitable logo, navigation links for 'Try our demo', 'About us', 'Help Center', 'Open a Giving Account', and 'Log in'. Below the header are three main menu items: 'The Giving Account' (Learn about our donor-advised fund), 'Research & Insights' (Discover the latest trends and content on giving), and 'Guidance' (Expert guidance on your giving strategy). There are also links for 'For companies', 'For advisors', and 'For charities'. A notification banner states: 'Time is running out to make tax-deductible contributions in 2021. Review our year-end contribution guidelines.' The main content area features a large image of a family in a field with a child in the foreground holding a kite. The text 'Family Philanthropy' is overlaid on the image. Below the image is a text block: 'Philanthropy can be a powerful way for families to pass along their shared beliefs and values. It can also provide unique opportunities for families to spend time together, collaborate, and learn more about one another. Integrating philanthropic conversations and activities into family life is an excellent way to encourage healthy attitudes about helping others and instill financial responsibility among younger generations. And giving together can be a bonding experience for family members of all generations.' Below this text is the heading 'Giving Together' and two sub-headings: '5 steps to engage a family in philanthropy' and 'Growing the family philanthropy tree'.

10 Skills of Dialogue

- 1 Monitor **Tone of Voice****
Being aware of *how* we say something, not just *what* we say
- 2 Explore with **Key Word Questions****
Seeking deeper understanding by listening for key words that convey emotion or a story
- 3 Be Mindful of **Reactivity****
Watching for reactions—the check engine light—to indicate that we lost personal choice
- 4 Choose Not to **Personalize****
Deciding not to take something personally by reflecting on what hooks part of our history
- 5 Cultivate Positive **Attributions****
Identifying kinder and gentler organized beliefs to direct our thinking and behavior
- 6 Create **Space with Doubt****
Putting openness and doubt in our language versus absolutizing our views
- 7 Connect by **Processing Out Loud****
Saying out loud what we are thinking and feeling in a way that creates shared meaning
- 8 Reset by **Reprocessing Bad Process****
Taking responsibility for bad process and resetting around authentic feelings
- 9 Test with **Process Questions****
Asking reflective questions about the “how” of an interaction
- 10 Offer **Forgiveness and Compassion****
Acknowledging the reality of a situation and letting go of the negative emotions that impact us



Fidelity Viewpoints® article:
[The 10 skills of dialogue](#)

How Fidelity Can Help

Support from a Fidelity representative

- ▶ Provides education and guidance with regard to common wealth planning strategies
- ▶ Answers questions you and your family may have regarding your evolving needs and goals
- ▶ [Fidelity.com/FindAnAdvisor](https://www.fidelity.com/FindAnAdvisor)

Insights from Fidelity Wealth Management

- ▶ Access to articles, webinars, and ideas from Fidelity's top thought leaders on wealth planning and investing strategies, designed to help you grow and protect your wealth
- ▶ [Fidelity.com/Insights](https://www.fidelity.com/Insights)

Subscribe to stay informed

- ▶ Presented by Fidelity professionals and industry leaders, our wealth management webinars span a variety of topics, including estate planning, tax planning, retirement income considerations, and much more
- ▶ [Fidelity.com/signup/wealth-management-webinars](https://www.fidelity.com/signup/wealth-management-webinars)

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