


Dawn M. Manning



June 27, 2023

To whom it may concern:

I hope that you can provide me with some clarity and answers regarding your Donor Advised Fund (DAF) policies. I opened a DAF account with Fidelity Charitable (FC) earlier this year. One of the main reasons I chose FC was because I was told that I could donate to 501(c)(3) charities of my choice and that FC would remain cause-neutral in approving my grant requests. It was also my understanding that I could make grants anonymously. It's important to me that I be allowed to make anonymous grants to charities of my choice because I want to stay off mailing lists. I'm also concerned about who else may want to know to whom I donate.

However, last month FC refused to approve my anonymous grant requests to Alliance Defending Freedom, Family Research Council, Center for Security Policy, and Pacific Justice Institute. It has been more than a month since I made these four grant requests and all currently show a status of "Awaiting Information." I received emails regarding each of these requests stating FC's "policies require reviewing all grant recommendations to ensure that grants are used exclusively for proper charitable purposes. In order for us to proceed with the recommendations **additional information is needed.**" FC asked that I call them about the grant requests.

When I called FC and asked why these grants were not being approved, I was told that Fidelity Charitable's Board of Trustees is not approving anonymous grants to these organizations at this time. I mentioned to the representative that I had been told prior to establishing my DAF that FC is cause-neutral. The representative reiterated that the Board of Trustees is not approving anonymous grants to these organizations at this time, but could not provide any additional information. He asked if I would like for the grant requests to be changed to include my name and address. I declined.

If FC's concern is truly over whether or not these organizations are using grants "exclusively for proper charitable purposes", I don't understand why simply agreeing to provide my name and address would make a difference in the decision to approve the grants. Also, the policy of refusing to approve grants to these organizations is confusing to me because these four organizations are all well-respected charities. Alliance Defending Freedom, Family Research Council, Center for Security Policy, and Pacific Justice Institute have scores of 87%, 81%, 88%, and

96% on Charity Navigator, a tool FC itself recommends to donors to evaluate charities.

After that phone conversation with the FC representative, I made requested grants to CAIR Foundation, Human Rights Campaign, and Lambda Legal Defense Fund. These are like the above groups, but are politically left leaning. FC quickly approved these requests. It appears that FC may be screening Alliance Defending Freedom, Family Research Council, Center for Security Policy, and Pacific Justice Institute because of their political or religious views, in violation of my understanding of FC's policies.

Also, Alliance Defending Freedom, Family Research Council, Center for Security Policy, and Pacific Justice Institute are considered hate groups by the Southern Poverty Law Center (SPLC). The first three are also named targets of Unmasking Fidelity, an activist campaign pressuring FC to stop allowing donations to these so-called "hate groups."¹ It appears that FC may be screening Alliance Defending Freedom, Family Research Council, Center for Security Policy, and Pacific Justice Institute based on whether groups like the SPLC and Unmasking Fidelity are targeting them. This is troubling because the SPLC is a far-left activist organization that targets mainstream conservative and religious groups. Even Politico acknowledges that the SPLC is "using the reputation it gained decades ago fighting the Klan as a tool to bludgeon mainstream politically conservative opponents."² Unmasking Fidelity is no better and has been criticized for bringing cancel culture to philanthropy.³ Our country needs more tolerance for diverse viewpoints, not more divisive rhetoric and blacklisting.

When I first opened my DAF account, FC representatives assured me that FC would direct grants from the DAF to virtually any 501(c)(3) charity I recommended and that it would remain cause-neutral in approving grant requests. FC's website reiterates that it is "cause-neutral"⁴ and says this means it "does not limit grantmaking based on political, religious, or philosophical grounds."⁵ My Program Guidelines also say that I can generally make donations anonymously.

Why isn't FC honoring anonymous donations to Alliance Defending Freedom, Family Research Council, Center for Security Policy, and Pacific Justice Institute? Is it because of their religious or political views? Is the Fidelity Charitable Board of

¹ http://unmaskingFC.org/wp-content/uploads/2021/12/9.30.21-Unmasking-FC-DISCLOSE-Letter-w_-Org-Sign-Ons.pdf.

² <https://www.politico.com/magazine/story/2017/06/28/morris-dees-splc-trump-southern-poverty-law-center-215312>.

³ <https://capitalresearch.org/article/the-hypocrisy-of-unmasking-FCs-leftists>.

⁴ <https://www.FCcharitable.org/giving-account/supported-charities.html>.

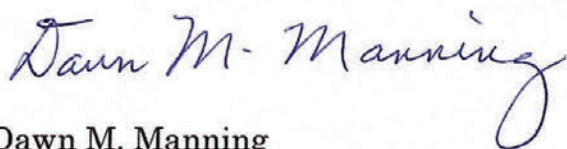
⁵ <https://www.FCcharitable.org/legal/granting-due-diligence.html>.

Trustees really making these decisions? And if so, what other organizations are they screening? Are you providing my name and grant information to third parties such as SPLC or the groups that signed onto Unmasking Fidelity?

This is a serious matter to me. FC has enriched my life by enabling me to give anonymously to charities I love. I hope FC will honor its promise to be cause-neutral by enabling me to donate anonymously to charities that I love and want to support.

I look forward to hearing from you soon.

Sincerely,

A handwritten signature in blue ink that reads "Dawn M. Manning". The signature is written in a cursive style with a large, looping 'M' and 'g'.

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