



# Kyle Casserino

Charitable Planning Consultant

Kyle Casserino is a charitable planning consultant at Fidelity Charitable<sup>®</sup>, an independent public charity that has helped donors support more than 278,000 nonprofit organizations with nearly \$35 billion in grants. The mission of Fidelity Charitable<sup>®</sup> is to grow the American tradition of philanthropy by providing programs that make charitable giving accessible, simple and effective. Mr. Casserino assumed his current role in 2019, and has been with Fidelity Charitable across multiple roles since 2013.

In this role, Mr. Casserino serves as a premier charitable planning resource to advisors and their clients in Southern California. He educates advisors on current charitable planning trends and strategies, along with leveraging the benefits of Fidelity Charitable's donor-advised fund program, to help philanthropic clients give more to the charities they support.

Prior to assuming his current role, Mr. Casserino was a charitable planning associate in the Northwest region, where he worked with advisors to enhance their understanding of Fidelity Charitable's donor-advised fund program and discuss ways to incorporate charitable giving into clients' overall financial and wealth management plans. Prior to that, Mr. Casserino worked as a fundraising associate where he supported the national fundraising team. He also worked as client services representative on the Fidelity Charitable Advisor Service Team.

Prior to joining Fidelity Charitable, Mr. Casserino worked as a student fund manager at the Center for Advanced Financial Education at Rogers Williams University Gabelli School of Business.

## Education

- Bachelor's degree in accounting and finance from Roger Williams University

## Contact Information

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“I’m deeply passionate about helping advisors and their clients build charitable strategies that align with their goals so they can give the most effectively to their favorite causes.”

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