



Tony M. Oommen

Vice President, Charitable Planning Consultant

Tony Oommen is a Vice President and Charitable Planning Consultant for Fidelity Charitable®, an independent public charity that has helped donors support more than 328,000 nonprofit organizations with over \$51 billion in grants since its inception in 1991.¹ The mission of Fidelity Charitable® is to grow the American tradition of philanthropy by providing programs that make charitable giving accessible, simple and effective.

Before joining Fidelity Charitable in 2015, Tony spent nearly 17 years as an advisor, developing a passion along the way for helping develop charitable giving plans for clients. He held various roles as a wealth advisor and financial planner for private wealth management firms in Chicago and Cincinnati since 1998.

In his current role with Fidelity Charitable, Tony builds relationships with advisors, enhancing their understanding of Fidelity Charitable's donor-advised fund program, and discusses creative and impactful ways that advisors can incorporate charitable giving into wealth management plans.

Active in the advisory and philanthropic communities, Tony is a board member of the DuPage County Estate Planning Council and is an active member of the Chicago Estate Planning Council. He also serves on giving professional advisory committees for the Ann and Robert H. Lurie Children's Hospital, Greenhouse Scholars, and WTTW/WFMT. Tony is the author of the philanthropy chapter in *Tools & Techniques of Estate Planning for Modern Families*, 3rd Edition, National Underwriter, 2018.

Education & Credentials

- Bachelor of science degree from the University of Illinois at Urbana-Champaign, 1993
- Certified Financial Planner (CFP®) designation since 2004

Contact Information

Office: 312-771-5676 | **Email:** tony.oommen@fmr.com

"I'm deeply passionate about increasing the capacity of the philanthropic sector by helping advisors and their clients build charitable strategies that efficiently convert good intentions into impactful action in order to fund the charitable causes they care most about."

¹ From Fidelity Charitable inception in 1991 through December 31, 2020.