



## Securities Processing Instructions for Trinity Avenue Presbyterian Church Donors

### Steps to initiate your gift:

- 1) To begin this process, please supply these detailed instructions to your broker.
- 2) The donor's broker should contact Mr. R. Brandon Whitley, VP/Institutional Advisor at First Citizens Bank (919-716-2015) to inform him of the incoming gift.
- 3) The most commonly used transfer instructions are below:

### Common Stock

**DTC PARTICIPANT NO:** 5409  
**DTC INTERNAL ACCOUNT NO:** F/B/O First Citizens Bank 74-2094-01-4  
**FOR FURTHER CREDIT:** Trinity Ave. Presbyterian Church-Gift  
a/c 47-0016-02-3

### Mutual Funds

Special instructions are required. The donor's broker must contact First Citizens directly to obtain specific transfer instructions. Note: due to the complexity involved, these transfers can take upwards of 30 days to complete.

### **\*Questions, issues, or additional instructions please contact:**

*R. Brandon Whitley, Institutional Advisor  
Brandon.Whitley@firstcitizens.com or 919-716-2015*

*Or*

*Kenny Jones, Trust Specialist  
Kenneth.Jones@firstcitizens.com or 919-716-2741*

*Direct mailing: First Citizens Bank & Trust Co, Attn: Brandon Whitley P.O. Box 29522 –CLN  
15 Raleigh, NC 27626*