



Securities Processing Instructions for SPCA of Wake County 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: SPCA of Wake County-Stock Gift a/c 68-0147-01-4

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*