



## Securities Processing Instructions for ECU Health Foundation 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. Matt Dellasega, Institutional Advisor at First Citizens Bank (919-716-2669) 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:** ECU Health Fnd – Gifts 71-0620-03-0

### 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:**

*Matt Dellasega, Institutional Advisor*  
*Matt.Dellasega@firstcitizens.com or 919-716-2669*

*Or*

*Addison Woody, Wealth Client Specialist*  
*addison.woody@firstcitizens.com or 919-716-2085*

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