



Securities Processing Instructions for Donor's gifts to Campbell University Incorporated



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: 74-2094-01-4 (FIRST CITIZENS BANK)
FOR FURTHER CREDIT: CU – Stock Gift a/c 680116019

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

*Charlie Dickinson, Jr., Wealth Client Specialist
Charlie.DickinsonJR@firstcitizens.com or 919-716-2741*

*Direct mailing: First Citizens Bank & Trust Co. Attn: Brandon Whitley
P. O. Box 29522-CLN15, Raleigh, NC 27626*

*Additional assistance or to report issues with any transactions please contact Peter Donlon at
Campbell University pdonlon@campbell.edu or the office of Institutional Advancement at
(910) 893-1224*