



THE  
FOUNDATION  
OF THE ROMAN CATHOLIC  
DIOCESE OF BUFFALO

**INSTRUCTIONS FOR TRANSFER OF STOCK FROM A DONOR'S BROKERAGE ACCOUNT  
DIRECTLY TO THE *FRCDB* BROKERAGE ACCOUNT**

TO: Diocese of Buffalo, Chuck Mendolera & Julie Mileham  
FROM: John Schimert/David Starck/Patty Wallaitis  
DATE: January 1, 2023  
RE: M & T Securities, Inc. Cash Wire Instructions/ Delivery Instructions  
DIOCESE OF BUFFALO A/C # 2564-9290

**WIRE TRANSFER INSTRUCTIONS**

For CASH TRANSFERS into your Account:

Bank: The Bank of New York  
ABA: 021000018  
Credit To: LPL Financial  
Credit Acct #: 8900511524  
To Further Credit: FNDN of the RC Diocese of Buffalo  
Account #: 2564-9290

**DTC Delivery Instructions**

DTC Eligible Securities should be delivered as follows:

LPL Financial  
DTC# 0075

For credit to account titled: FNDN of RC Diocese of Buffalo  
Account # 2564-9290

**CHECKS SENT VIA MAIL**

Any checks sent should be payable to "LPL Financial fbo FNDN of the RC Diocese of Buffalo", with the account # 2564-9290 listed in the Memo area, mailed to the following address:

M & T Securities, Inc  
Attn: ISG Team/ Patty Wallaitis  
285 Delaware Ave. Suite 2000  
Buffalo, NY 14202

Please call us at 800-724-2120 with any questions or comments. Thank you.

Letter to The Foundation of the Roman Catholic Diocese of Buffalo

The Foundation of the Roman Catholic Diocese of Buffalo  
795 Main Street Buffalo, NY 14203  
P: 716.847.8370  
F: 716.847.5589

\_\_\_\_\_  
(date)

Dear FRCDB:

I am happy to inform you that I/we are donating stock to \_\_\_\_\_ (my parish)  
c/o the Diocese of Buffalo for \_\_\_\_\_ (year).

I will transfer my stock to your account through my broker. I am giving \_\_\_\_\_ (#  
of shares) of \_\_\_\_\_ (name of company) stock as my gift.

Please note the following:

Broker's Name: \_\_\_\_\_

Brokerage Firm: \_\_\_\_\_

Telephone #: \_\_\_\_\_

I expect the transfer to take place on or about \_\_\_\_\_ (date).

If you need to contact me, I can be reached at \_\_\_\_\_ (telephone #).

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
(Parish Name)