



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: June 15, 2021
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 DIOCESE OF BUFFALO

Catholic Center
c/o Finance Department
795 Main Street
Buffalo, NY 14203
P: 716.847.8370
F: 716.847.5589

(date)

Dear Diocese of Buffalo:

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)