

# WINTRUST<sup>®</sup>

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## WEALTH MANAGEMENT

To whom it may concern,

Please use the following instructions for diverse asset donations:

### **DTC Eligible Securities:**

DTC Number: 0141  
Name of Firm: Wells Fargo Clearing Services  
Account Number: 1234-1234  
Account Title: *Registration*

### **Government Securities** (Treasuries, STRIPS, Agencies, Mortgage Backed Securities):

Name of Bank: Bank of NYC/FCCORP  
Routing Number: ABA# 021000018  
Further Credit to: 1234-1234

### **Mutual Funds:**

Mutual Funds can be donated as a partial Automated Customer Account Transfer (ACAT) using DTC number 0141, or as a Re-Registration of Assets. To request a BIN number for re-registration, please send a written letter or email to the Discount Division Team via email at [supportteam@wintrustwealth.com](mailto:supportteam@wintrustwealth.com), fax to (312) 846-9542 or mail to the address listed below. The request must contain the following:

- The delivering firm name, account number, account type and registration.
- The Mutual Fund name, symbol, CUSIP and number of shares.
- The receiving firm's account number and registration.

Please be aware, a BIN request can take a minimum of 5 business days to process and obtain the information.

### **Contact Information:**

Wintrust Wealth Management Discount Division Team  
231 South LaSalle Street, 13<sup>th</sup> Floor  
Chicago, IL 60604  
Phone: 800-445-2233  
Email: [Supportteam@wintrustwealth.com](mailto:Supportteam@wintrustwealth.com)