



## Stock, Mutual Funds and Incoming Wire Transfers Instructions for Donors

*As of November 2022*

**As account information may change over time, please contact UD prior to initiating a transfer to ensure that you have the most current instructions.**

### **Stock Transfers**

The University of Delaware holds accounts with the two below brokerage firms. If you have an account with one of these firms, please instruct your broker to use this account. Otherwise, please use the Wilmington Advisors @ M&T account (LPL Financial). **Please instruct your advisor to send your name along with the transfer.**

It is also important that you or your broker contact and disclose to the University the following:

- Donor name
- Name/ticker of stock
- Number of shares
- How you would like the gift proceeds to be allocated
- Time frame expected
- Name of brokerage account

**Prior to the transfer of any gift, the above information should be submitted either to the development gift officer with whom you are currently communicating or the following University Treasury Services contact(s):**

**Kristen Garcia**  
Manager, Treasury Services  
(302) 831-3675  
[krisaber@udel.edu](mailto:krisaber@udel.edu)

**Theresa Staso**  
Sr. Accountant  
[tstaso@udel.edu](mailto:tstaso@udel.edu)

**Beth Fetcho**  
Director, Treasury Operations  
[bfetcho@udel.edu](mailto:bfetcho@udel.edu)

All accounts are in the name “University of Delaware”

<b>Broker</b>	<b>Contact Information</b>	<b>Account Number</b>
LPL Financial  (Wilmington Advisors @ M&T)	285 Delaware Ave. Ste. 100 Buffalo, NY 14202  Contact information: <b>Steven Smith</b> Assistant Vice President, ISG/ Municipal Capital Markets (410) 318-6841 <a href="mailto:sc.smith@mandtfinancialservices.com">sc.smith@mandtfinancialservices.com</a>	4900-3713  DTC 0075

Broker	Contact Information	Account Number
Janney Montgomery Scott	<b>Anthony A. Snaith</b> (610) 254-1101 <a href="mailto:asnaith@janney.com">asnaith@janney.com</a>  <b>Nancy Mansfield</b> (610) 254-1131 <a href="mailto:nmansfield@janney.com">nmansfield@janney.com</a>  Toll Free: (800) 866-7608	836-46606 DTC 0374

**Mutual Funds**

If you wish to transfer mutual funds that are held directly with the fund company / issuer, you or your broker should contact Steven Smith with Wilmington Advisors @ M&T: [sc.smith@mandtfinancialservices.com](mailto:sc.smith@mandtfinancialservices.com) or (410) 318-6841.

If the mutual fund(s) are held with a brokerage firm, please have your broker transfer the mutual fund(s) via the same process as if it were a stock.

**Incoming Electronic Wire Transfers**

If you wish to transfer funds directly from your account instead of initiating a stock or mutual fund transfer, please use the following banking details and/or contact M&T Bank:

M&T Bank 1 Fountain Plaza Buffalo, NY 14203	Bank Contact: Halona Durham (302) 427-4703 (302) 735-2089 (fax) <a href="mailto:hdurham@mtb.com">hdurham@mtb.com</a>
Bank Routing & Transit Number:	022000046
Account Name:	University of Delaware General Operating
Account Number:	1034-8250
SWIFT for international wires:	MANTUS33
CHIPS ID for international wires:	0555
Reference:	<b>Please provide your name and how you would like the gift to be allocated.</b>