Data Feed Addition Form

For Investment Professionals Establishing Accounts using

Trust Solution Provider or Donor Advised Fund Sponsor ("Solution Provider")
Renaissance Philanthropic Solutions Group

Investment Professional: Once the Pershing account is open, complete this form and send it to your back-office.

IBD Back-Office: In order to update their system and perform their duties, this Solution Provider has established an FTP site with BNY Mellon Pershing, through which they receive Pershing Standard Files. There is no cost to your firm to use this FTP site. Please add the account(s) listed below to the Solution Provider's FTP Site Destination ID listed below.

STEP 1. SOLUTION PROVIDERS AND DESTINATION IDS

Please check one

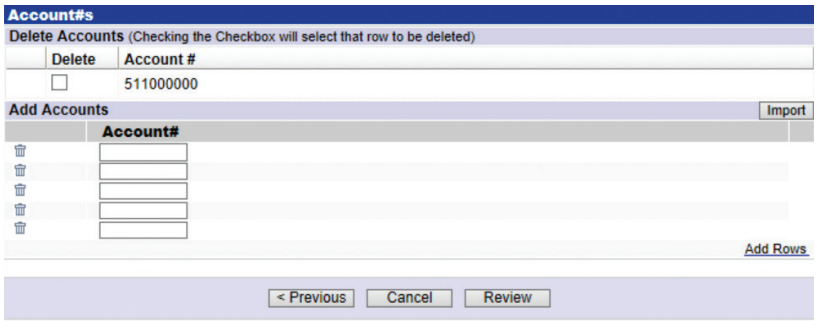
TRUST SOLUTION PROVIDER	DESTINATION ID
☐ Arden Trust Company	FJY
☐ American Endowment Foundation	T5W
☐ BOK Financial	TPG
☐ Capital First Trust Company	FEI
☐ Comerica Bank & Trust	TZL
☐ New York Private Trust	T52
☑ Renaissance Charitable Foundation	TU5
☐ Renaissance Philanthropic Solutions Group	TU5

STEP 2. ACCOUNT(S) TO BE ADDED TO DESTINATION ID

IMPORTANT:
ADD ONLY THIS ACCOUNT OR ACCOUNTS. USE ONLY THE ACCOUNTS SECTION OF THE DESTINATION EXTRACT CRITERIA SCREEN PICTURED HERE.

Complete instructions for using Trust Network and Philanthropic Solutions are available in BNY Mellon Pershing's Trust Solutions User Guide and Philanthropic Solutions User Guide. Both User Guides are available on NetX360 > Menu > Resources > Learning Center.

If you have questions, contact your Pershing Account Manager.



© 2021 Pershing LLC. Pershing LLC, member FINRA, NYSE, SIPC, is a wholly owned subsidiary of The Bank of New York Mellon Corporation (BNY Mellon). Trademark(s) belong to their respective owners.