



**THE CATHOLIC  
FOUNDATION**  
*For the People of the Diocese of Rockford*

**Contact Information**

555 Colman Center Dr.  
Rockford, IL 61125

Phone: (815) 399-4300  
Fax: (815) 399-5657

[www.Foundationrockford.org](http://www.Foundationrockford.org)

**Mutual Fund Transfer Instructions**

Please submit this information to the Catholic Foundation Office at the address above. Once this information is received, the Diocese will establish an account to receive your specific Mutual Fund gift. The Diocese will contact your transfer agent with the necessary information. Thank you for your generosity.

**I. Donor Information:**

Date: \_\_\_\_\_

Donor Name : \_\_\_\_\_

Donor Address: \_\_\_\_\_

City, State Zip: \_\_\_\_\_

Parish Name: \_\_\_\_\_ City \_\_\_\_\_

Amount of gift: \_\_\_\_\_ (and/or) Number of Shares: \_\_\_\_\_

Name of Fund and Class: \_\_\_\_\_

Ticker Symbol: \_\_\_\_\_ CUSIP # \_\_\_\_\_

Donor's Transfer Agent Name: \_\_\_\_\_

Transfer Agent Phone: (\_\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_\_) \_\_\_\_\_

**To My Transfer Agent:**

Please transfer the above stated amount as a charitable contribution from my above mentioned Mutual Fund Account to the Catholic Diocese of Rockford as listed below:

Signature of donor (account owner): \_\_\_\_\_ Date: \_\_\_\_\_

(The Diocese will fill in the missing account number and send it to your transfer agent.)

**Broker Number (DTC):** 0141  
**Broker Name:** Wells Fargo Advisors  
6801 Springcreek Rd.  
Rockford, IL 61114-7420 **Phone:** (815) 921-0555

**Account name:** The Catholic Foundation, Diocese of Rockford 2

**Account Number:**

**Comments:** (Donor name and address) (FEIN: 36-3537989)

Thank You

Daniel O'Malley  
Executive Director