



Finance &  
Administration

## Diocese of Rockford

555 Colman Center Dr.  
P.O. Box 7044  
Rockford, IL 61125

(815) 399-4300  
Fax: (815) 399-5591

### To Wire A Mutual Fund as a Donation to a Diocesan Entity

Please submit this information to the Office of Finance and Administration 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 \_\_\_\_\_

Account Number \_\_\_\_\_ 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(s)):

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

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

<b>Broker Number (DTC):</b>	0141	
<b>Broker Mailing Address:</b>	Wells Fargo Advisors P.O. Box 6307 Rockford, IL 61125 (815) 921-0555	If sending by FedEx, UPS, DHL 6801 Springcreek Rd. Rockford, IL 61114-7420
<b>Phone:</b>		
<b>Account name:</b>	Catholic Diocese of Rockford	(FEIN: 36-0879840)
<b>Account Number:</b>	_____	
<b>Comments:</b>	(Donor name and address)	

Thank You,

Daniel G. O'Malley  
Diocesan Accountant