



Office of Charitable
Giving

Diocese of Rockford

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

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

Mutual Fund Transfer Instructions Diocesan Appeal

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.)

Broker Number (DTC): 0141

Broker Mailing Address: Wells Fargo Advisors
P.O. Box 6307
Rockford, IL 61125

If sending by FedEx, UPS, DHL
6801 Springcreek Rd.
Rockford, IL 61114-7420

Phone: (815) 921-0555

Account name: Catholic Diocese of Rockford (FEIN: 36-0879840)

Account Number: _____

Comments: (Donor name and address)

Thank you.