



Finance &
Administration

Diocese of Rockford

555 Colman Center Drive
P.O. Box 7044
Rockford, Illinois 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.)

Broker Number (DTC): 0141
Broker Name: Wells Fargo Advisors
P.O. Box 6307
Rockford, IL 61125 **Phone:** (815) 921-0555
Account name: Catholic Diocese of Rockford (FEIN: 36-0879840)
Account Number:
Comments: (Donor name and address)

Thank You,
Daniel G. O'Malley
Director of Accounting