



ADVANCEMENT FOUNDATION
Supporting the Catholic Diocese of Fort Worth



Dear Donor,

The Catholic Diocese of Fort Worth established the Catholic Diocese of Fort Worth **Advancement Foundation in 2013**. This Foundation was established to accept contributions restricted to the purpose for which they were given. This will ensure the protection of these contributions for the use that is specified by you.

Attached please find instructions for an electronic transfer of stock to an account at Merrill Lynch for the Catholic Diocese of Fort Worth Advancement Foundation. If you have any questions regarding this process or wish to discuss any specific steps, please feel free to call me at 817-945-9441 or e-mail me at runderwood@advancementfoundation.org. You can also email Dianna Rhoads, our gift processing supervisor who manages all stock transactions, at drhoads@advancementfoundation.org. Her phone/fax number is 817.945.9463.

The Catholic Diocese of Fort Worth Finance Office, as the hired processing agent for the Catholic Diocese of Fort Worth Advancement Foundation, is in service to, first and foremost, you, the donor, then to the parish, school or Diocesan entity that is your beneficiary. Thank you in advance for your generosity and support of the Diocese of Fort Worth and its parishes, schools and apostolates.

Sincerely yours in Christ,

Renée Underwood
Associate Director

**INSTRUCTIONS FOR AN ELECTRONIC TRANSFER OF STOCK TO THE
CATHOLIC DIOCESE OF FORT WORTH ADVANCEMENT FOUNDATION**

1) It is my intention to donate the following: _____ shares of _____
corporation stock to the Catholic Diocese of Fort Worth **Advancement Foundation** for the benefit of:
(Please check)

- Annual Diocesan Appeal
- Tuition Assistance Fund for Catholic Schools
- St. John Paul II Shepherd's Guild (formerly Bishop's Guild) to support Seminarians
- Parish (name/city) _____
(name of campaign/fund) _____
- School (name/city) _____
(name of campaign/fund) _____
- Other Diocesan Entity (name/city) _____
(name of campaign/fund) _____

2) Please give the following information to your broker:

Please handle the transfer of this stock to the account of the Catholic Diocese of Fort Worth Advancement Foundation at Merrill Lynch, Pierce, Fenner & Smith, Inc. ("Merrill Lynch"), 201 Main St., Ste. 2100, Fort Worth, TX 76102-3122.

- The account number at Merrill Lynch is **552-04032**.
- The DTC number for Merrill Lynch is **8862**.
- The account title is "**Catholic Diocese of Fort Worth Advancement Foundation.**"
- The Financial Consultant for this account is **Mr. Toby Ardoyno at 817.877.9718**.
- The Client Associate for this account is **Ms. Ann Peoples at 817.877.9705**.
- If you need to contact someone at the Catholic Diocese of Fort Worth, please call Ms. Dianna Rhoads at 817.945.9463

3) Please complete this form and send to Dianna Rhoads

Mail: Advancement Foundation *or Email* drhoads@advancementfoundation.org
800 West Loop 820 South
Fort Worth, TX 76108 *or Fax:* 817-945-9463

Date _____

Donor Name _____

Mailing Address _____

City, State, Zip _____

E-Mail Address _____

Home Phone Number _____

Cell Phone Number _____