



ADVANCEMENT FOUNDATION
Supporting the Catholic Diocese of Fort Worth



Dear Donor,

The Catholic Diocese of Fort Worth has established a new Foundation, The Catholic Diocese of Fort Worth Advancement Foundation, into which all mutual funds will be deposited. This new Foundation was established to accept contributions restricted to the specific purpose for which they were given. This will ensure the protection of these contributions for the use that is restricted.

Attached please find instructions for an electronic transfer of mutual funds to an account at **Raymond James** 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 817-945-9440 or email me at pparrish@advancementfoundation.org.

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

Sincerely yours in Christ,

Paula K. Parrish, CFRE
Executive Director

PKP/ve

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

1) It is my intention to donate the following:

_____ Shares of _____ mutual fund, or
\$ _____ of _____ mutual fund to the
Catholic Diocese of Fort Worth Advancement Foundation for the benefit of:

(Please check)

- Bishop's Guild to support the Seminarians and Elderly Priests
- Bishop's Scholars Tuition Assistance Fund for Catholic Schools
- Parish _____ (name, city of parish)
_____ (name of campaign/fund)
- School _____ (name, city of school)
_____ (name of campaign/fund)
- Other Diocesan entity _____ (name, city of entity)
_____ (name of campaign/fund)

2) The following information can be given to your broker:

Please handle the transfer of this mutual fund to the account of the Catholic Diocese of Fort Worth Advancement Foundation at Raymond James Financial Services, Inc.

- The Omnibus BIN at Raymond James Financial Services, Inc. is 92500015.
- The account number at Raymond James Financial Services, Inc. is 19229861.
- The DTC number for Raymond James Financial Services, Inc. is 0725.
- The account title is "Catholic Diocese of Fort Worth Advancement Foundation."
- The financial consultants in charge of the account are Mr. Chris S. Young at 214-378-2217 or Mr. Chandler Ferguson at 214-378-2246 or Ms. Kimberly Vesely at 214-378-2209.
- If you need to contact someone at the Catholic Diocese of Fort Worth, please call Ms. Paula Parrish, Executive Director of the Advancement Foundation at 817-945-9440, or pparrish@advancementfoundation.org or Advancement Foundation Assistant, Ms. Veronica Esquivel at 817-945-9442, or by e-mail at vesquivel@advancementfoundation.org

3) Please complete this form and send a copy to Paula Parrish or Veronica Esquivel

Mail: Advancement Foundation
800 W Loop 820 S
Fort Worth, TX 76108

or Email: pparrish@advancementfoundation.org
vesquivel@advancementfoundation.org
or Fax: 817-945-9442

Donor Name _____ Date _____
Home Phone _____ Cell Phone _____
Address _____ City _____ ST _____ Zip _____
Email Address _____