



ADVANCEMENT FOUNDATION
Supporting the Catholic Diocese of Fort Worth



Dear Donor,

The Catholic Diocese of Fort Worth has established a new corporation, Catholic Diocese of Fort Worth Advancement Foundation. This new 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.

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 817-945-9440 or e-mail 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 Foundation, 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

**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)

- 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 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 **5198**.
- 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 Peeples at 817.877.9705**.
- 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 Ms. Veronica Esquivel at 817-945-9442.

3) Please complete this form and send to Paula K. Parrish, CFRE, or Veronica Esquivel

Mail: Advancement Foundation
800 West Loop 820 South
Fort Worth, TX 76108

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

Date _____

Donor Name _____

Home Phone Number _____

Mailing Address _____

City, State, Zip _____

E-Mail Address _____

Cell Phone Number _____