



# Advancement Foundation

CATHOLIC DIOCESE  
OF FORT WORTH

Dear Donor,

The Catholic Diocese of Fort Worth established a Foundation in 2013, 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 by you.

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 contact **Dianna Rhoads** at [drhoads@adv-fdn.org](mailto:drhoads@adv-fdn.org). Her number is 817-533-3174.

The Catholic Diocese of Fort Worth Advancement Foundation is here to serve you, the donor, as well as the parish, school or Diocesan entity that you choose as beneficiary of your mutual fund contributions. 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, CFRE  
Chief Operating Officer

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

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Parish Name/City: \_\_\_\_\_

Please accept my donation of the following:

\_\_\_\_\_ Shares of \_\_\_\_\_ mutual fund, or  
\$ \_\_\_\_\_ of \_\_\_\_\_ mutual fund to the  
**Catholic Diocese of Fort Worth Advancement Foundation** (Federal Tax ID Number: 27-0518360) for the  
benefit of:

- Parish: \_\_\_\_\_  
Name of Campaign/Fund/Endowment: \_\_\_\_\_
- Catholic School: \_\_\_\_\_  
Name of Campaign/Fund/Endowment: \_\_\_\_\_
- Annual Diocesan Appeal  Saint John Paul II Shepherd’s Guild (Seminarian Education)
- Priest Care Fund  Catholic Schools Tuition Assistance Fund
- Other: \_\_\_\_\_

Comments / Special Instructions: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**For the administrator of your Mutual Fund Account:**

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.
- The contact at the Advancement Foundation is **Ms. Dianna Rhoads**, 817-533-3174, [drhoads@adv-fdn.org](mailto:drhoads@adv-fdn.org)

Please complete this form and send to Dianna Rhoads, Supervisor of Gift Management, at the address below or via email to [drhoads@adv-fdn.org](mailto:drhoads@adv-fdn.org) or fax to 817-803-5310. All donations are subject to a 2% gift processing fee.