



Building Faith | Inspiring Hope | Igniting Change



CATHOLIC
GIFT
ANNUITY®

Administered by Catholic Extension

CATHOLIC GIFT ANNUITY

Steps in finalizing the contract

BUILDING FAITH
INSPIRING HOPE
IGNITING CHANGE

150 South Wacker, Suite 2000
Chicago, IL 60606
www.catholicextension.org

ESTABLISHING CATHOLIC GIFT ANNUITY CONTRACT

- Step 1: Donor completes application, IRS W9 and check payable to Catholic Gift Annuity; either gives to diocesan staff or mails directly to Catholic Extension, 150 S. Wacker, Suite 2000, Chicago, IL 60606.
- Step 2: Catholic Extension reviews application, creates contract and mails back contract to diocesan staff or directly to donor.
- Step 3: Donor signs and returns contract to Catholic Extension in provided postage paid envelope.
- Step 4: Catholic Extension returns fully executed contract to donor sends an electronic copy for diocese staff.

ILLUSTRATION FULL STEWARDSHIP

STEP 1:

- DONOR COMPLETES APPLICATION AND WRITES CHECK PAYABLE TO “CATHOLIC GIFT ANNUITY”;
- DIOCESE FORWARDS TO CATHOLIC EXTENSION



Application,
W9 &
Check



Mail to
Catholic
Extension

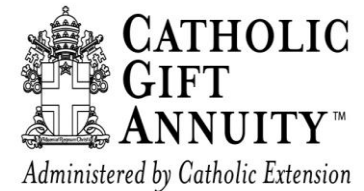


ILLUSTRATION FULL STEWARDSHIP

STEP 2:

- CATHOLIC EXTENSION PREPARES CONTRACT;
- DIOCESE REPRESENTATIVES PRESENTS CONTRACT TO DONOR



Presents
Contract



Prepares
Contract



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ILLUSTRATION FULL STEWARDSHIP

STEP 3:

-DONOR SIGNS CONTRACT

-DIOCESE MAILS BACK TO CATHOLIC EXTENSION
FOR COMPLETION



ILLUSTRATION FULL STEWARDSHIP

STEP 4:

-CATHOLIC EXTENSION FULLY EXECUTES THE CONTRACT AND SENDS ORIGINAL BACK TO DONOR AND ELECTRONIC COPY TO FOR DIOCESE RECORDS



Mails Fully
Executed
Contract



Electronic
file sent
Diocesan
records



ADDITIONAL INFORMATION

- Personal visits are not required to finalize the contract.
- It is up to the discretion of diocesan staff to determine the best way to steward their donors.
- Catholic Extension staff can work directly with your donor.
- Any questions feel free to email [Bobbi Hannigan](mailto:Bobbi.Hannigan@catholicextension.org) or call 312-795-6047.