

Building Faith | Inspiring Hope | Igniting Change



CATHOLIC GIFT ANNUITY

Annuitant Bank and Tax Mailing Samples

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

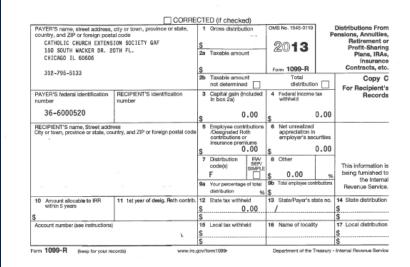


c	XXXX41988	AZ	STATE STREET CORPORA Catholic Church Extension ADVICE OF INCOME DISTR	TION Society GAF	NOVEMBER	1, 2013
	PAYMENT FI IN THE AMOUNT ACH DEPOSIT MADE	ROM: OF: TO:	CATHOLIC CHURCH EXTENSION \$2,357.62 XXXXX8070/XXXXX7242	SOCIETY GAF	XTB)	81014
5	CHARITABLE ASSET MANA STATE STREET FINANCIAL DNE LINCOLN STREET BOSTON, MA 02111-2900			PRESORTED FIRST CLASS	2015715349	02 1R 0002010465 MAILED FROM ZIP
XO	556 (11/07)		IG4-737 60606	150 S	<i>առշութ ը</i> կվիլնվորվել	



ANNUITANT ANNUAL 1099R CATHOLIC CATHOLIC CATHOLIC CATHOLIC





2013 IRS 1099-R Instructions for Annuitants

Enclosed please find Copy C of IRS Form 1099-R. This form contains tax information regarding annulty payments you received from us during the past year. You should enter this information on your federal tax return as outlined below. This form is for your records only and should not be attached to your tax return.

Form 1099-P item	Box #	Definition	Form 1040 entry line
Gross distribution	1	Total of annuity payments	line 16a
Taxable amount	2a	Ordinary income plus capital gain income	subtract box 3 from box 2a, enter results on line 16b
Capital gain	3	long-term capital gain income	Schedule D, line 13, Column F
Federal Income Tax Withheld	4	Tax Withheld	line 61
Employee contributions or insurance premiums*	5	Non-taxable income	do not report on Form 1040
Distribution code	7	F = gift annuity	do not report on Form 1040

*Please note that box 5 represents the tax-free portion of your annulty income payments. Notes:

Federal Income Tax withholding

Dear Annuitant

The above letter assumes no federal income tax withholding. Generally, federal income tax is not withheld from gift annuity payments. In this case, it is not necessary to attach a 1099-R to the annuitant's 1040 thus only Copy C need be sent to the annuitant for their records. However, under certain circumstances, such as the annuitant being a non-resident alien federal withholding is required. In this case, Copy B and Copy C of the 1099-R will be sent to the annuitant and the annuitant is instructed to attach Copy B to his or her 1040 or applicable tax return.