

How to Submit your OIC Charitable Gift Annuity Annual Report

After you answer all the questions on page 1, and upload all required documents, go to the third tab (Page 3). This is what it looks like:

1
Annual Filing

2
Documents

3
Final Submission

Previous

Declaration

By submitting these documents electronically to the Office of the Insurance Commissioner, Company Supervision Division, the below Annual Report Preparer certifies they have the authorization to submit the electronic documents to the Office of the Insurance Commissioner, Company Supervision Division, on behalf of the entity.

Under the penalties of perjury, by submitting the documents the Preparer below and the entity on whose behalf the documents are submitted declare that these documents have been examined by the officer providing the Annual Report Attestation and to the best of this Preparer's knowledge and belief the information contained in the submitted documents are in all aspects true, correct, and complete.

Preparer Name *

Preparer Title *

Annual Report Contact Address

Contact Person *

Street 1 * Street 2

City * Country *

State/Province * Zip *

Email *

Phone # - Ext * - Fax Other Phone #

Compliance Officer Contact Address

Contact Person *

Street 1 * Street 2

City * Country *

State/Province * Zip *

Email *

Phone # - Ext * - Fax Other Phone #

FINAL SUBMISSION button - to submit the completed annual filing to the Office of Insurance Commissioner (OIC). Once this button is clicked and the validation confirms there are no errors detected with the filing, the form will be sent to the OIC and will be considered the official annual filing. **Once you select Final Submission, the form can only be changed by amendment.**

Print Validate Filing Save

Final Submission

Previous

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Please review the information for the Annual Report (Financial Statement) Contact and update as necessary. **We send the confirmation of Annual Report filing to the email address in this section**, so you'll want to make sure that it's correct.

Annual Report Contact Address			
Contact Person *	Mary Richards	Street 2	
Street 1 *	219 Oak Ridge Ave	Country *	United States
City *	Denver	Zip *	80201
State/Province *	Colorado	Other Phone #	
Email *	email sent to this address		
Phone # - Ext *	303-555-1212 -	Fax	303-555-0000

Review and update, if needed.

Next, add or update the Compliance Officer contact information.

Compliance Officer Contact Address			
Contact Person *	Sandy Flagstone	Street 2	
Street 1 *	5515 West 3rd Street	Country *	United States
City *	Providence	Zip *	02904
State/Province *	Rhode Island	Other Phone #	
Email *	hidden		
Phone # - Ext *	401-555-1212 - 151	Fax	

Add the information, or update.

Read the declaration; then sign the Annual Report by adding your name and title.

By submitting these documents electronically to the Office of the Insurance Commissioner, Company Supervision Division, the below Annual Report Preparer certifies they have the authorization to submit the electronic documents to the Office of the Insurance Commissioner, Company Supervision Division, on behalf of the entity.

Under the penalties of perjury, by submitting the documents the Preparer below and the entity on whose behalf the documents are submitted declare that these documents have been examined by the officer providing the Annual Report Attestation and to the best of this Preparer's knowledge and belief the information contained in the submitted documents are in all aspects true, correct, and complete.

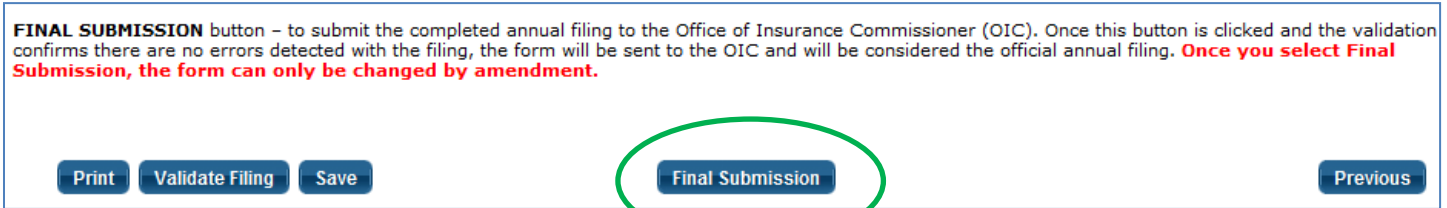
Preparer Name * Mary Richards

Preparer Title * President

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When you're ready to submit your Annual Report, click the *Final Submission* button.

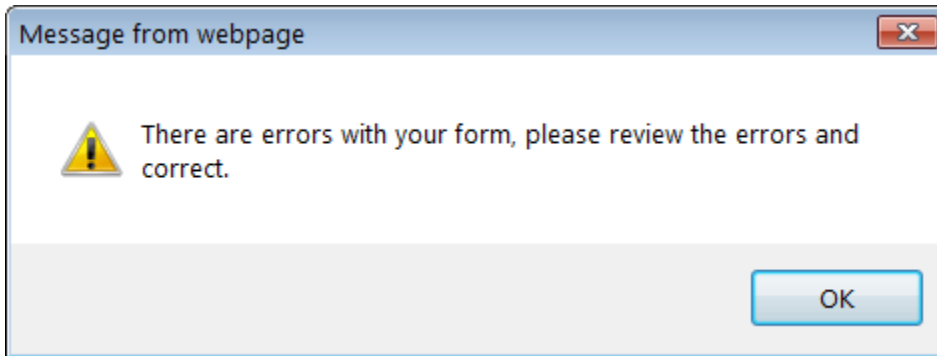
FINAL SUBMISSION button – to submit the completed annual filing to the Office of Insurance Commissioner (OIC). Once this button is clicked and the validation confirms there are no errors detected with the filing, the form will be sent to the OIC and will be considered the official annual filing. **Once you select Final Submission, the form can only be changed by amendment.**



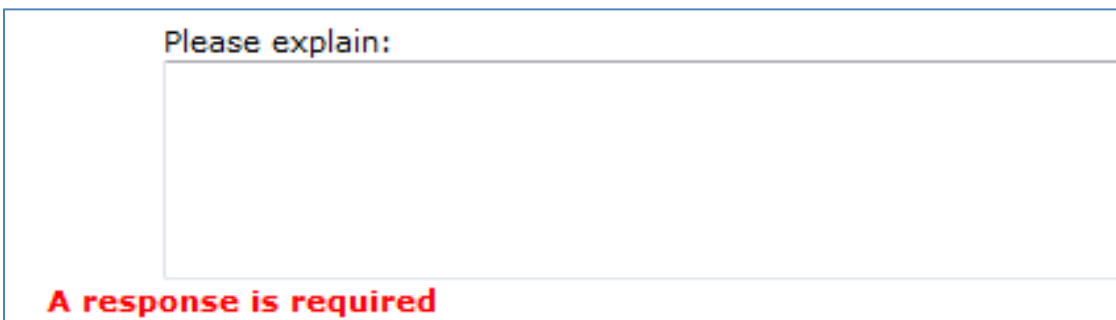
Validation Checks

The system runs validation checks to confirm that responses were made and documents uploaded.

If anything is missing, a pop up message will let you know. If that happens, click the OK button. Then correct the error(s).

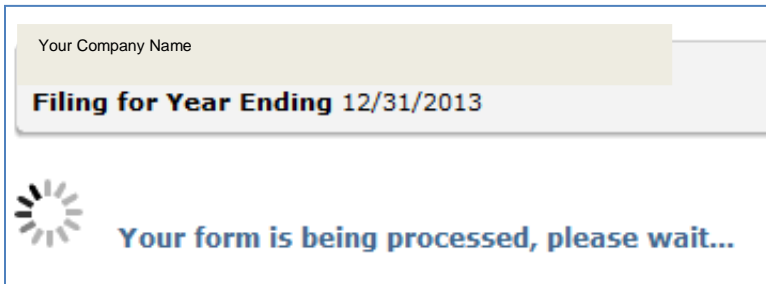


The Annual Report will highlight where the error(s) occurred with red text. For example:




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After you correct the error(s), click the Final Submission button again. If there are no validation errors, the system will process your Annual Report.



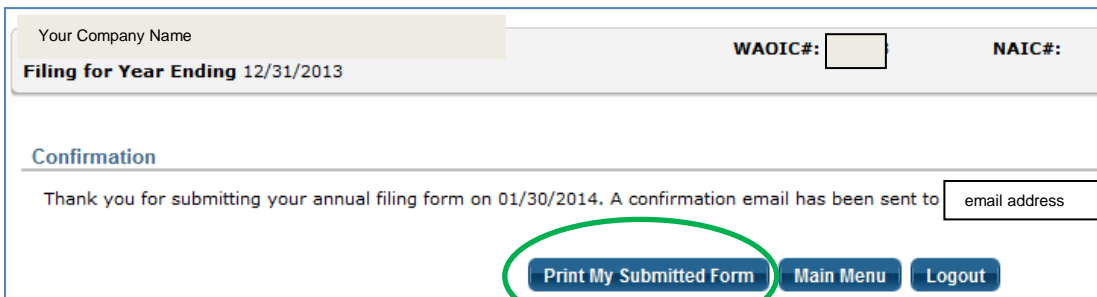
Your Company Name

Filing for Year Ending 12/31/2013

 **Your form is being processed, please wait...**

After accepting your filing, the system confirms receipt on the screen and sends a confirmation email to the Annual Report Contact Address.

The system now offers you the option to print your Annual Report to a PDF file. You can also return and print it later.



Your Company Name

Filing for Year Ending 12/31/2013

WAOIC#:

NAIC#:

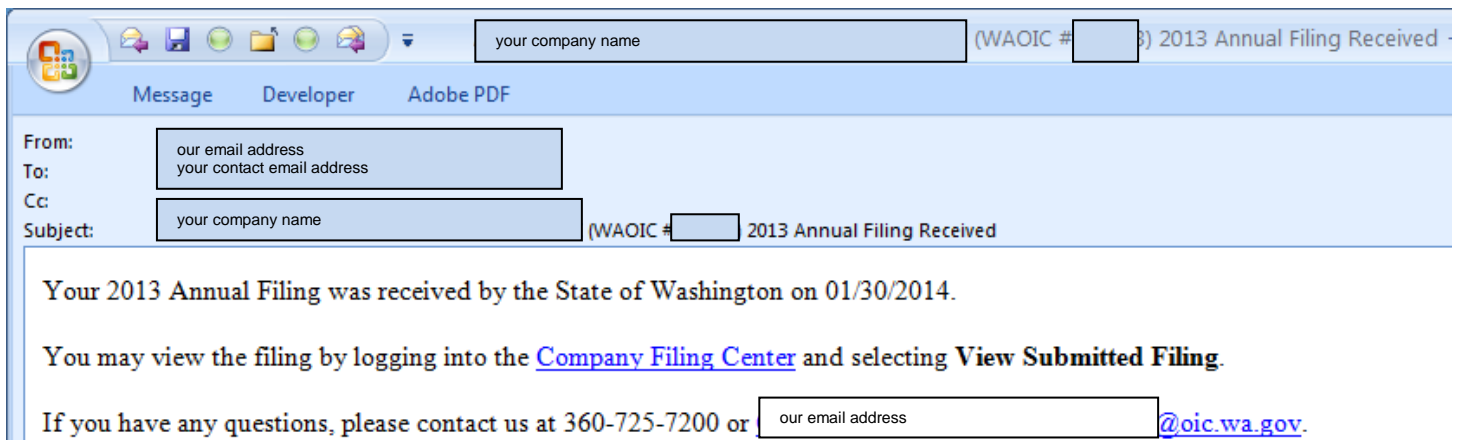
Confirmation

Thank you for submitting your annual filing form on 01/30/2014. A confirmation email has been sent to

[Print My Submitted Form](#) [Main Menu](#) [Logout](#)

You may now exit by clicking the *Logout* button or you can go back to the Main Menu.

Here is a sample of the confirmation email:



your company name (WAOIC #) 2013 Annual Filing Received

Message Developer Adobe PDF

From:
To:
Cc:
Subject: (WAOIC #) 2013 Annual Filing Received

Your 2013 Annual Filing was received by the State of Washington on 01/30/2014.

You may view the filing by logging into the [Company Filing Center](#) and selecting **View Submitted Filing**.

If you have any questions, please contact us at 360-725-7200 or @oic.wa.gov.