

How to upload documents for your OIC Charitable Gift Annuity Annual Report

Here is a sample of the Documents screen (Page 2):

1
2
3

Annual Filing
Documents
Final Submission

Previous
Next

Washington Filings Filings marked with asterisk (*) are required to be filed unless waived

Due	Documents to be filed	Signature Required	Attachments	Last Uploaded Date
09/30/2014	Audited Financial Statements *	Yes	0 Uploaded Files	
09/30/2014	IRS Form 990 *	Yes	0 Uploaded Files	
At Time of Filing	Separate Reserve Fund Attestation *	Yes	0 Uploaded Files	
At Time of Filing	Annual Report Attestation *	Yes	0 Uploaded Files	
At Time of Filing	Actuarial Certification *	Yes	0 Uploaded Files	

Supporting Documents from Answers on Annual Report Due at Time of Filing

Documents to be filed	Attachments	Last Uploaded Date
Summary of Annuity Contracts - Attach a listing of all Washington annuity contracts. (The listing should be for annuity contracts issued to Washington State residents only, and should not include annuities issued to residents of other states.) *	0 Uploaded Files	
Separate Reserve Fund Account Detail - Please provide a copy of bank/brokerage statements. *	0 Uploaded Files	

There are certain documents that every Registrant must file. We show those in the upper area titled “Washington Filings”. The *Due* column shows when the document must be filed.

Washington Filings Filings marked with asterisk (*) are required to be filed unless waived

Due	Documents to be filed	Signature Required	Attachments	Last Uploaded Date
09/30/2014	Audited Financial Statements *	Yes	0 Uploaded Files	
09/30/2014	IRS Form 990 *	Yes	0 Uploaded Files	
At Time of Filing	Separate Reserve Fund Attestation *	Yes	0 Uploaded Files	
At Time of Filing	Annual Report Attestation *	Yes	0 Uploaded Files	
At Time of Filing	Actuarial Certification *	Yes	0 Uploaded Files	

If there are other documents that you must file, those appear in the lower area under “Supporting Documents”. You must file these documents at the same time as the Annual Report.

Supporting Documents from Answers on Annual Report Due at Time of Filing

Documents to be filed	Attachments	Last Uploaded Date
Summary of Annuity Contracts - Attach a listing of all Washington annuity contracts. (The listing should be for annuity contracts issued to Washington State residents only, and should not include annuities issued to residents of other states.) *	0 Uploaded Files	
Separate Reserve Fund Account Detail - Please provide a copy of bank/brokerage statements. *	0 Uploaded Files	

How to upload documents for your OIC Charitable Gift Annuity Annual Report

To upload a document, click the link for that Document in the *Attachments* column.

Supporting Documents from Answers on Annual Report Due at Time of Filing	
Documents to be filed	Attachments
Summary of Annuity Contracts - Attach a listing of all Washington annuity contracts. (The listing should be for annuity contracts issued to Washington State residents only, and should not include annuities issued to residents of other states.) *	0 Uploaded Files

The screen changes to the Upload screen. Notice that the name of the document that you selected appears on the Upload screen. That's your reminder of which document you are going to upload.

Washington State Office of the Insurance Commissioner

Welcome Your Company Name [Home] | [Logout]

OIC Online Services

Your Company Name

Filing for Year Ending 06/30/2013

WAOIC#: NAIC#: Charitable Gift Annuity

WA CGA Contracts Outstanding

Attach a listing of all Washington annuity contracts. (The listing should be for annuity contracts issued to Washington State residents only, and should not include annuities issued to residents of other states.)

No documents have been filed yet.

Upload PDF File

Browse...

Upload

Return to Filing

If you're on the correct document, click the *Browse* button.
If you need to cancel, click the *Return to Filing* button.

WA CGA Contracts Outstanding

Attach a listing of all Washington annuity contracts. (The listing should be for annuity contracts issued to Washington State residents only, and should not include annuities issued to residents of other states.)

No documents have been filed yet.

Upload PDF File

Browse...

Upload

Return to Filing

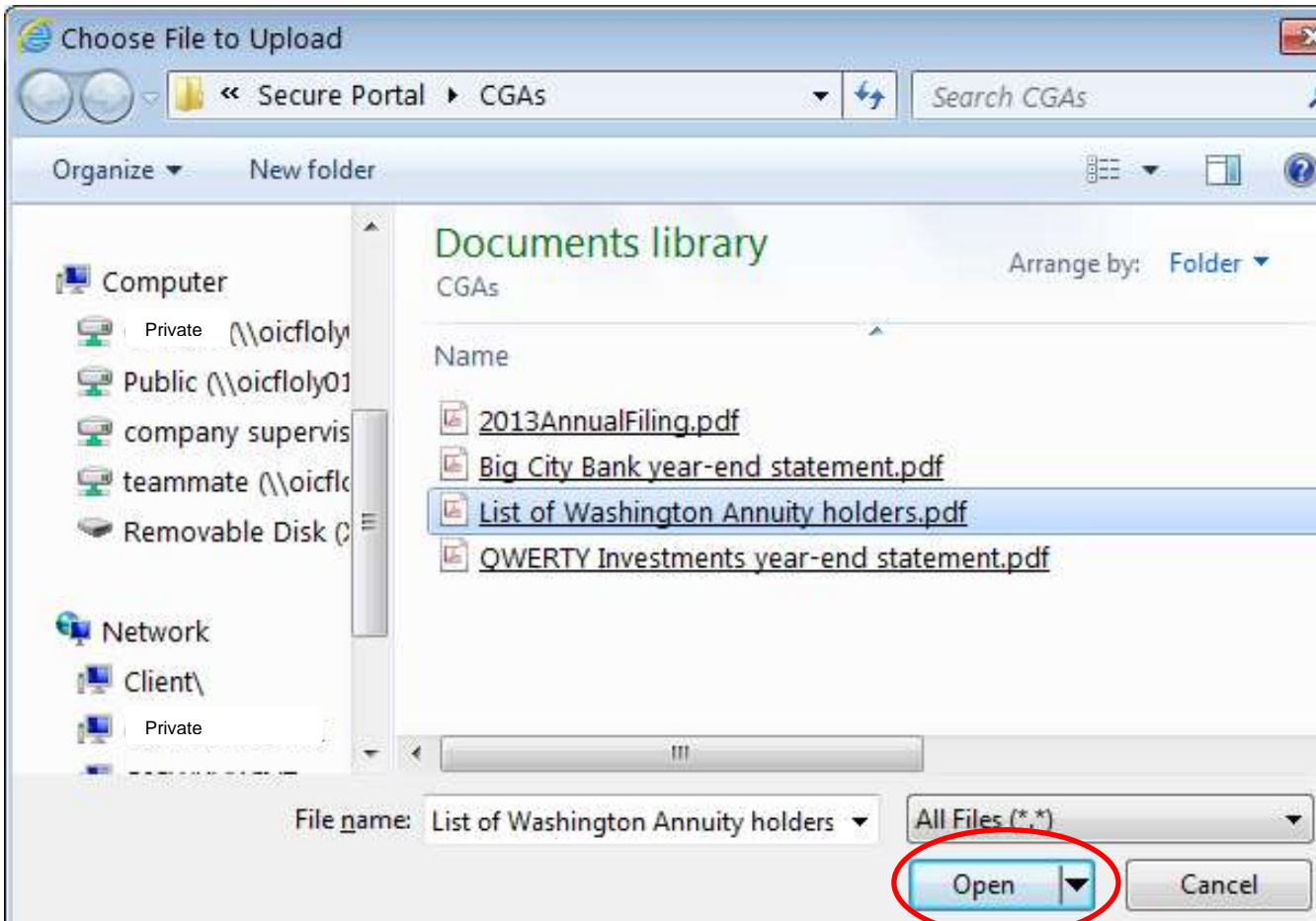
Click to browse to your file

Or click to cancel

How to upload documents for your OIC Charitable Gift Annuity Annual Report

After you click *Browse*, a window will pop up and allow you to choose which file you want to upload. The file must exist somewhere that you have access to on your system. If you need help finding the document, please contact your company's computer support personnel.

After you find the correct file, click on the *Open* button. That tells our system where to find the file.

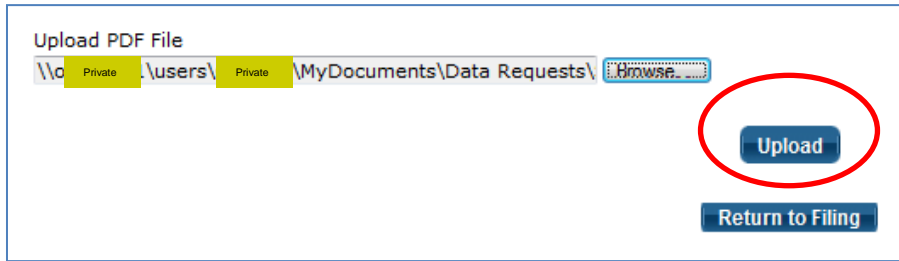


It's important to ensure that you select the correct document. Once you upload it, it becomes part of the OIC records.

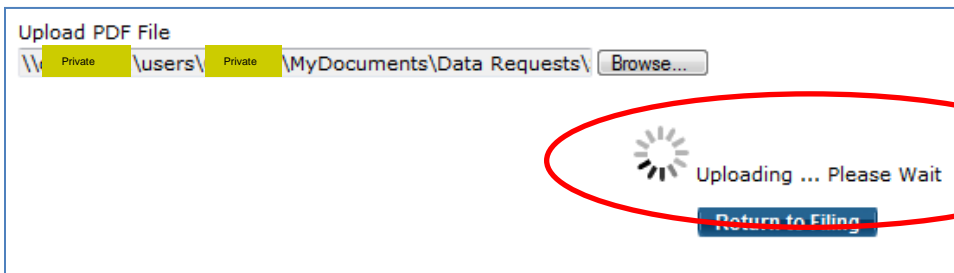
If you're not sure that you have the correct file, either *Browse* again or click the *Return to Filing* button to cancel without uploading.

How to upload documents for your OIC Charitable Gift Annuity Annual Report

When you're sure you have the correct file. Click the *Upload* button.



The system will indicate that it's uploading your file. If you get an error message, please consult with your company's computer security or support personnel to help you ensure that you have the rights to access and upload your file.

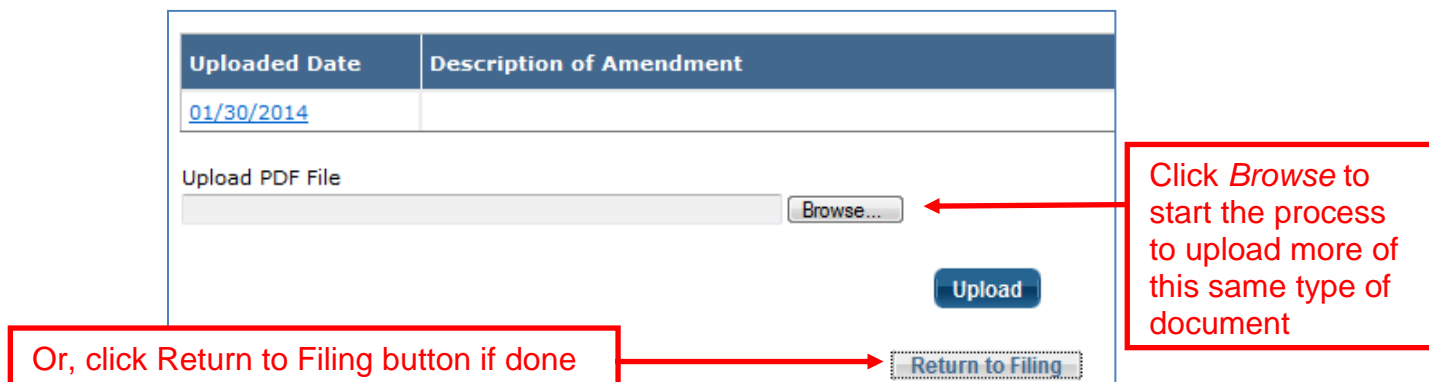


After uploading the document, the area that previously said, "No documents have been filed yet", now shows the upload date.

Uploaded Date	Description of Amendment
01/30/2014	

If there is more than one document of this same type to upload, click *Browse* again and upload more documents of the same type.

If you have no more of that type of document to upload, click the *Return to Filing* button.



How to upload documents for your OIC Charitable Gift Annuity Annual Report

The Documents page now shows an uploaded file and the date of the upload. Each time you upload another file, the link will update to show the count.

Supporting Documents from Answers on Annual Report Due at Time of Filing

Documents to be filed	Attachments	Last Uploaded Date
Summary of Annuity Contracts - Attach a listing of all Washington annuity contracts. (The listing should be for annuity contracts issued to Washington State residents only, and should not include annuities issued to residents of other states.) *	1 Uploaded Files	02/13/2014
Separate Reserve Fund Account Detail - Please provide a copy of bank/brokerage statements. *	0 Uploaded Files	

Continue with this process until you have uploaded all required documents, in the proper category.

! It's important that you upload only the document that the system indicates.
! This means: DON'T upload different documents into the same category.

Next up: Final Submission