



# DIOCESE OF MONTEREY

Finance Office

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## MEMORANDUM

**TO:** Pastors, Principals, Business Managers, and Bookkeepers

**FROM:** Tom Riordan, Vicar for Temporalities and Administration and Anne McGuire, Director of IT and Business Support

**DATE:** December 2, 2009

**RE:** Guidelines and Information Regarding 1099 Report Submission

Please review the enclosed information regarding 1099 guidelines and 1099 report submission to the Diocese of Monterey Finance Office.

- 2009 1099 Filing Guidelines
- Sample of a completed W-9 document
- 1099 Vendor Setup and Report Generation Guidelines (QuickBooks)

This information has been presented in past years at the 1099 Review seminars which took place in 2007 and 2008. This year, if any of you have questions about this information, or are new to the Diocese of Monterey, please contact Stephanie Mayer, Controller at (831) 373-4346, ext. 209 or Anne McGuire, Director of IT and Business Support at (831) 373-4346, ext. 276 for information and/or training.

If you have any questions regarding the 2009 1099 Filing Guidelines, please contact Stephanie Mayer, Controller, at (831) 373-4346, ext. 209 or Anne McGuire, Director of IT and Business Support, at (831) 373-4346, ext. 276.

The document titled 1099 Vendor Setup and Report Generation Guidelines (QuickBooks) explains how to generate the Excel report that will be emailed to the Diocese of Monterey at [1099report@dioceseofmonterey.org](mailto:1099report@dioceseofmonterey.org). If you have any questions about this report or any other QuickBooks related questions, please contact Stephanie Mayer, Controller at (831) 373-4346, ext. 209 or Anne McGuire, Director of IT and Business Support at (831) 373-4346, ext. 276

The deadline for emailing the 1099 Detail Report (in Excel format) back to us at [1099reports@dioceseofmonterey.org](mailto:1099reports@dioceseofmonterey.org) is **January 6, 2010** (or sooner if possible.) Thank you very much for your help in getting this information to us by this deadline.