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Important Tax Withholding Information

The following information is being provided because all or a portion of a distribution from the Puerto Rico Clergy Retirement Security Program and/or the Puerto Rico Methodist Personal Investment Plan (a Plan) you are receiving from Wespath may be eligible to be rolled over to an IRA (an individual retirement account or individual retirement annuity), as defined in Puerto Rico Internal Revenue Code (PRIRC) section 1081.02, established in Puerto Rico or an eligible employer.

[Tax Notice Regarding Distributions](#)

Wespath provides the *Tax Notice Regarding Distributions* to residents of Puerto Rico and those receiving benefits from Puerto Rico plans. This notice provides information on rollover-eligible distributions as well as other general information regarding distributions.

Further details regarding the taxation of distributions is available [here](#).

This notice, additional information and links to tax forms are also available on the Wespath website [tax information page](#).

a general agency of The United Methodist Church



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To contact Wespath Benefits and Investments, [click here](#).