

CORRECTED (if checked)

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|---|---|---|--|---|
| TRUSTEE'S/PAYER'S name, street address, city, state, and ZIP code STERLING HSA 1000 Broadway Suite 250 Oakland, CA 94607 800-617-4729 | | 1 Employee or self-employed person's Archer MSA contributions made in 2020 and 2021 for 2020 <p style="text-align: right;">\$0.00</p> | OMB No. 1545-1518 <p style="font-size: 2em; text-align: center;">2020</p> Form 5498-SA | HSA, Archer MSA, or Medicare Advantage MSA Information |
| | | 2 Total contributions made in 2020 <p style="text-align: right;">\$2,300.00</p> | | |
| TRUSTEE'S federal identification number <p style="font-size: 1.2em;">84-1637046</p> | PARTICIPANT'S social security number <p style="font-size: 1.2em;">***-**-7068</p> | 3 Total HSA or Archer MSA contributions made in 2021 for 2020 <p style="text-align: right;">\$0.00</p> | | <p style="font-size: 1.5em; font-weight: bold;">Copy B For Recipient</p> This information is being furnished to the Internal Revenue Service. |
| PARTICIPANT'S name street address (including apt. no.), city, state, and ZIP code Jogendra Somarouthu 942 CAMPBELL ST, BLDG 9 South Plainfield ,NJ 07080 | | 4 Rollover contributions <p style="text-align: right;">\$0.00</p> | 5 Fair market value of HSA, Archer MSA, or MA MSA <p style="text-align: right;">\$2,794.00</p> | |
| Account number(see instructions) INJ720695 | | 6 <input checked="" type="checkbox"/> HSA <input type="checkbox"/> Archer MSA <input type="checkbox"/> MA MSA | | |
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Form 5498-SA

(Keep for your records)

Department of the Treasury - Internal Revenue Service

Instructions for Participant

This information is submitted to the Internal Revenue Service by the trustee of your health savings account (HSA), Archer MSA, or Medicare Advantage MSA (MA MSA).

Generally, contributions you make to your Archer MSA are deductible. Employer contributions are excluded from your income and are not deductible by you. If your employer makes a contribution to one of your Archer MSAs, you cannot contribute to any Archer MSA for that year. If you made a contribution to your Archer MSA when your employer has contributed, you cannot deduct your contribution, and you will have an excess contribution. If your spouse's employer makes a contribution to your spouse's Archer MSA, you cannot make a contribution to your Archer MSA if your spouse is covered under a high deductible health plan that also covers you.

Contributions that the Social Security Administration makes to your MA MSA are not includible in your gross income nor are they deductible. Neither you nor your employer can make contributions to your MA MSA.

Generally, contributions you or someone other than your employer make to your HSA are deductible on your tax return. Employer contributions to your HSA may be excluded from your income and are not deductible by you. You and your employer can make contributions to your HSA in the same year.

See Form 8853 and its instructions or Form 8889 and its instructions. Any employer contributions made to an Archer MSA are shown on your Form W-2 in box 12 (code R); employer contributions made to an HSA are shown in box 12 (code W). For more information, see Pub. 969.

Account number

May show an account or other unique number the trustee assigned to distinguish your account.

Box 2

Shows the total contributions made in 2020 to your HSA or Archer MSA. See Pub. 969 for who can make contributions. This includes qualified HSA funding distributions (trustee-to-trustee transfers) from your IRA to fund your HSA. The trustee of your MA MSA is not required to, but may, show contributions to your MA MSA.

Box 3

Shows the total HSA or Archer MSA contributions made in 2021 for 2020

Box 4

Shows any rollover contribution from an Archer MSA to this Archer MSA in 2020 or any rollover from an HSA or Archer MSA to this HSA. Also included are qualified HSA distributions (direct transfers) from a health flexible spending arrangement (FSA) or health reimbursement arrangement (HRA) to fund an HSA. See Form 8853 or Form 8889 and their instructions for information about how to report distributions and rollovers. This amount is not included in box 1, 2, or 3.

Box 5

Shows the fair market value of your HSA, Archer MSA, or MA MSA at the end of 2020

Box 6

Shows the type of account that is reported on this Form 5498-SA. Other information. The trustee of your HSA, Archer MSA, or MA MSA may provide other information about your account on this form.

Note

Do not attach Form 5498-SA to your income tax return. Instead, keep it for your records

Participant's identification number

For your protection, this form may show only the last four digits of your social security number (SSN), individual taxpayer identification number (ITIN), or adoption taxpayer identification number (ATIN). However, the issuer has reported your complete identification number to the IRS, and, where applicable, to state and/or local governments.