



1 / 3



## Health Savings Account Year-End Status Report 2020

This information is being furnished to you as a summary of your account for tax filing purposes. The following report reflects your HSA activity with **HSA Bank** during 2020. If you transferred or rolled over funds from another institution, any prior transactions will not be reflected in this report.

<b>Accountholder</b>	Himalay Mohanlal Jorjwal
<b>HSA Account #:</b>	80803428
<b>Social Security #:</b>	XXX-XX-8935

<b>1. Account Balance at the beginning of 2020 tax year</b>	
2. Total Contributions during 2020 attributable to 2019*	
3. Total Contributions during 2020 attributable to 2020*	
4. Transfer Contributions during 2020	
5. Rollover Contributions during 2020	
6. Distributions from the account during 2020	\$
7. Transfer Distributions from the account during 2020	
8. Excess Contributions plus earnings for the 2019 tax year that were withdrawn in 2020	
9. Excess Contributions plus earnings for the 2020 tax year that were withdrawn in 2020	
10. Fees charged to the account during 2020	
11. Earnings on the account during 2020	
<b>12. Fair Market Value of HSA as of December 31, 2020</b>	

\* Line 2 and 3 represent a total contribution to the account. Your employer will report all pre-tax contributions to you on your W-2. For information purposes, HSA Bank provides a breakdown of employer and employee contributions through HSA Bank's Internet Banking site.

### What you need to know for filing your taxes

- Filing your Taxes:** When filing your taxes, you will need to complete *IRS Form 8889*. *IRS Form 8889* and *IRS Form 8889 Instructions* can be downloaded from our website [www.hsabank.com/taxes](http://www.hsabank.com/taxes), or by visiting the IRS site: [www.irs.gov/formspubs/](http://www.irs.gov/formspubs/)

To complete IRS Form 8889, you may need the W-2 provided by your employer. The W-2 will provide the total pre-tax contributions made to your HSA. The pre-tax contributions will include any employer contributions and employee pre-tax contributions.

- Find the Enclosed 5498-SA Forms:** Enclosed you will find 5498-SA forms for contribution activity during 2020. The total of the 5498-SA forms should equal the amounts provided in lines 2, 3 and 5. **Please note that Box 2 of the 5498SA shows all contributions made in the calendar year 2020 including contributions for 2019 made in 2020.** If you make additional 2020 contributions in 2021 an updated 5498-SA form will be sent to you by May. *5498-SA forms are not included if you did not have contribution activity in 2020.*
- Find the Enclosed 1099-SA Forms:** Enclosed you will find 1099-SA forms for distribution activity which occurred throughout 2020. The total of the 1099-SA forms should equal the amounts provided in lines 6, 8 and 9. *1099-SA forms are not included if you did not have distribution activity in 2020.*
- Verify the Information Provided:** If any of the above information does not agree with your records, please contact HSA Bank at (800) 357-6246.
- Contributions made in 2021 for 2020:** The above status report reflects all activity from January 1, 2020 through December 31, 2020. Under IRS guidelines, you are allowed to make 2020 contributions at any time prior to the deadline, without extensions, for filing your federal income tax return for 2020. For calendar year taxpayers, this deadline for contributions is generally April 15<sup>th</sup>. Contributions made for 2020 between January 1, 2021 and April 15, 2021 are not reflected on this report. An updated form 5498-SA will be sent to you and the IRS between April 15, 2021 and May 31, 2021 as a confirmation of your total contributions attributable to tax year 2020. To view an up-to-date contribution listing, please log in to our internet banking site at [www.hsabank.com/internetbanking](http://www.hsabank.com/internetbanking).
- Contribution Deadlines for 2020**  
All contributions made in 2021 for 2020 must indicate the contribution year and be received by the following dates:  
 Online contributions\*: April 15, 2021 (Must be submitted by 2:00 p.m., CT)  
 Wire contributions: April 15, 2021 (Must be received by 12:00 p.m., CT)  
 Mailed contributions: Received by April 15, 2021

\*Note: First time users of the Online Transfer System in Internet Banking will need to complete the set-up process, which may take three to four business days to complete.

This Year-end Status Report and other tax documents are available for download from HSA Bank's Internet Banking site [www.hsabank.com/internetbanking](http://www.hsabank.com/internetbanking). Tip: To access these documents you must have Pop-up Blockers turned off and you must have the latest version of Adobe.

For questions, please contact HSA Bank at (800) 357-6246.

CORRECTED (if checked)

TRUSTEE'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number

HSA Bank, a division of Webster Bank, N.A.  
605 N 8th Street, Ste. 320  
Sheboygan, WI 53081

1 Employee or self-employed person's Archer MSA contributions made in 2020 and 2021 for 2020

\$

2 Total contributions made in 2020

OMB No. 1545-1518

**2020**

**HSA, Archer M  
Medicare Adv  
MSA Infor**