

# Health Savings Account Year-End Status Report 2021

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 2021. If you transferred or rolled over funds from another institution, any prior transactions will not be reflected in this report.

<b>Accountholder</b>	Vishwa Singh
<b>HSA Account #:</b>	83581162
<b>Social Security #:</b>	XXX-XX-1449

<b>1. Account Balance at the beginning of 2021 tax year</b>	<b>\$750.03</b>
2. Total Contributions during 2021 attributable to 2020*	\$375.00
3. Total Contributions during 2021 attributable to 2021*	\$5,975.00
4. Transfer Contributions during 2021	\$0.00
5. Rollover Contributions during 2021	\$0.00
6. Distributions from the account during 2021	\$4,721.47
7. Transfer Distributions from the account during 2021	\$2,379.22
8. Excess Contributions plus earnings for the 2020 tax year that were withdrawn in 2021	\$0.00
9. Excess Contributions plus earnings for the 2021 tax year that were withdrawn in 2021	\$0.00
10. Fees charged to the account during 2021	\$0.00
11. Earnings on the account during 2021	\$0.66
<b>12. Fair Market Value of HSA as of December 31, 2021</b>	<b>\$0.00</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 2021. 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 2021, including contributions for 2020 made in 2021.** If you make additional 2021 contributions in 2022 an updated 5498-SA form will be sent to you in May. *5498-SA forms are not included if you did not have contribution activity in 2021.*
- Find the Enclosed 1099-SA Forms:** Enclosed you will find 1099-SA forms for distribution activity which occurred throughout 2021. 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 2021.*
- 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 2022 for 2021:** The above status report reflects all activity from January 1, 2021 through December 31, 2021. Under IRS guidelines, you can make 2021 contributions at any time prior to the deadline, without extensions, for filing your federal income tax return for 2021. For calendar year taxpayers, this deadline for contributions is generally April 15<sup>th</sup>. Contributions made for 2021 between January 1, 2022 and April 15, 2022 are not reflected on this report. An updated form 5498-SA will be sent to you and the IRS between April 15, 2022 and May 31, 2022 as a confirmation of your total contributions attributable to tax year 2021. 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 2021**  
All contributions made in 2022 for 2021 must indicate the contribution year and be received by the following dates:  
*Online contributions\*:* April 15, 2022 (Must be submitted by 2:00 p.m., CT)  
*Wire contributions:* April 15, 2022 (Must be received by 12:00 p.m., CT)  
*Mailed contributions:* Received by April 15, 2022

\*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 2021 and 2022 for 2021 \$	OMB No. 1545-1518  <b>2021</b>  Form <b>5498-SA</b>	<b>HSA, Archer MSA, or Medicare Advantage MSA Information</b>
PARTICIPANT'S TIN 06-0273620		2 Total contributions made in 2021 \$ 6,350.00	3 Total HSA or Archer MSA contributions made in 2022 for 2021 \$	
PARTICIPANT'S name  Vishwa Singh  Street address (including apt. no.) 1612 Glengate Cir  City or town, state or province, country, and ZIP or foreign postal code Morrisville NC 27560		4 Rollover contributions \$	5 Fair market value of HSA, Archer MSA, or MA MSA \$ 0.00	
Account number (see instructions)  83581162		6 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA MSA <input type="checkbox"/>		

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For Participant

This information is being furnished to the IRS.

Form **5498-SA**

(keep for your records)

www.irs.gov/Form5498SA

Department of the Treasury - Internal Revenue Service

CORRECTED (if checked)

TRUSTEE'S/PAYER'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		OMB No. 1545-1517 Form <b>1099-SA</b> (Rev. November 2019) For calendar year 20 21		<b>Distributions From an HSA, Archer MSA, or Medicare Advantage MSA</b>
PAYER'S TIN 06-0273620	RECIPIENT'S TIN XXX-XX-1449	1 Gross distribution \$ 4,721.47	2 Earnings on excess cont. \$	
RECIPIENT'S name  Vishwa Singh  Street address (including apt. no.) 1612 Glengate Cir  City or town, state or province, country, and ZIP or foreign postal code Morrisville NC 27560		3 Distribution code 1-Normal Distribution	4 FMV on date of death \$	
Account number (see instructions)  83581162		5 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA MSA <input type="checkbox"/>		

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For Recipient

This information is being furnished to the IRS.

Form **1099-SA** (Rev. 11-2019)

(keep for your records)

www.irs.gov/Form1099SA

Department of the Treasury - Internal Revenue Service

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