



P.O. Box 271629
Salt Lake City, UT 84127-1629

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Shalini Gupta
1406 Edison glen terrace
Edison, NJ 08837-2939

Important: IRS tax form 5498-SA for your health savings account (HSA)

Dear Shalini:

The enclosed IRS tax form 5498-SA shows your 2021 contributions to your HSA. Please use this information to fill out IRS tax form 8889 which is what you'll need to submit your taxes. To access IRS tax form 8889 log in at [irs.gov](https://www.irs.gov) and navigate to Forms and Publications.

Here's what you need to know:

- Box 2 shows your total contributions made for 2021 including those made in 2021 for 2020, if applicable.
- You have until the tax filing deadline of this year to submit contributions for 2021. If you make any contributions in 2022 before the tax deadline for 2021 you will receive an updated 5498-SA in May.
- To get your total contributions for 2021 add Box 2 plus Box 3. Please note if you made any contributions in 2021 for 2020 you need to review your updated 5498 for 2020 and subtract that from Box 3.
- The Fair Market Value consists of your HSA cash balance and any investment balance as of 12/31/2021.
- If you had a reportable distribution for 2021, you'll also get tax form 1099-SA. If you did not use (no distributions) your HSA in 2021 you will not get a 1099-SA.

Ready to say goodbye to printed forms? Sign in to your HSA, click "Accounts" from menu bar, select "Account Management" and update your Communications preference to "Online".

Questions? Please log in at myuhc.com to access your HSA or call 1-800-791-9361.

CORRECTED (if checked)

TRUSTEE'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number Optum Bank P.O. Box 271629 Salt Lake City UT 84127-1629		1 Employee or self-employed person's Archer MSA contributions made in 2021 and 2022 for 2021 \$ 0	OMB No. 1545-1518 2021 Form 5498-SA	HSA, Archer MSA, or Medicare Advantage MSA Information
		2 Total contributions made in 2021 \$ 3,516.70		
TRUSTEE'S federal identification number 470858534	PARTICIPANT'S social security number *****7296	3 Total HSA or Archer MSA contributions made in 2022 for 2021 \$ 0.00		Copy B For Participant This information is being furnished to the Internal Revenue Service.
PARTICIPANT'S name Shalini Gupta Street address (including apt. no.) 1406 Edison glen terrace City or town, state or province, country, and ZIP or foreign postal code Edison NJ 08837-1482		4 Rollover contributions \$ 0.00	5 Fair market value of HSA, Archer MSA, or MA MSA \$ 3,463.21	
		6 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA <input type="checkbox"/> MSA <input type="checkbox"/>		
Account number (see instructions) 417953688				

Form 5498-SA

(keep for your records)

www.irs.gov/form5498sa

Department of the Treasury - Internal Revenue Service



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Important: IRS tax form 1099-SA for your health savings account (HSA)

Dear Shalini:

This enclosed IRS tax form 1099-SA shows your 2021 distributions from your HSA. Please use this information to fill out IRS tax form 8889 which is what you'll need to submit your taxes. To access IRS tax form 8889 log in at irs.gov and navigate to Forms and Publications.

Here's what you need to know:

- Box 1 includes your total distributions for 2021.
- Box 2 shows any earnings on the excess while it was in the account.
- Box 3 shows the distribution code. Different codes will display depending on the situation. Code 1 summarizes all reportable distributions made in 2021. This does not include fees or investment losses as these are not reportable. Code 2 reports any excess contribution corrected that were processed against your account. For all other code descriptions please contact a tax professional.
- Any corrections processed before 1/1/2022 are reflected on this form. However, any corrections processed in 2022 will cause a corrected tax document to be generated shortly.
- If you had any contributions that apply to 2021, you'll also get tax form 5498-SA.

Ready to say goodbye to printed forms? Sign in to your account to access your HSA, click "Accounts" from menu bar, select "Account Management" and update your Communications preference to "Online".

Questions? Please log in at myuhc.com to access your HSA or call 1-800-791-9361.

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 Optum Bank P.O. Box 271629 Salt Lake City UT 84127-1629		OMB No. 1545-1517 2021 Form 1099-SA		Distributions From an HSA, Archer MSA, or Medicare Advantage MSA Copy B For Recipient This information is being furnished to the Internal Revenue Service.
PAYER'S federal identification number 470858534	RECIPIENT'S identification number *****7296	1 Gross distribution \$ 53.65	2 Earnings on excess cont. \$ 0	
RECIPIENT'S name Shalini Gupta Street address (including apt. no.) 1406 Edison glen terrace City or town, state or province, country, and ZIP or foreign postal code Edison NJ 08837-1482		3 Distribution code 1	4 FMV on date of death \$ 0	
Account number (see instructions) 417953688		5 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA <input type="checkbox"/> MSA		

Form 1099-SA

(keep for your records)

www.irs.gov/form1099sa

Department of the Treasury - Internal Revenue Service