

2021 Form 3922: Transfer of Stock Acquired Through an Employee Stock Purchase Plan Under Section 423(c)

OMB No. 1545-2129

Copy B, For Employee

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

EMPLOYEE'S name, street address, city, state and zip code

MOGULOJU, RAJESH
UNIT 207 1305 SE UNIVERSITY AVE
WAUKEE, IA 50263

124140-ATH-11-124140-02AE1

CORRECTED

CORPORATION'S name, street address, city, state and ZIP code

ATHENE HOLDING LTD
SECOND FLOOR
WASHINGTON HOUSE
16 CHURCH STREET
HAMILTON, BERMUDA, HM 11

CORPORATION'S federal identification number
980630022

EMPLOYEE'S identification number
xxx-xx-7065

Instructions for Employee

You have received this form because (1) your employer (or its transfer agent) has recorded a first transfer of legal title of stock you acquired pursuant to your exercise of an option granted under an employee stock purchase plan and (2) the exercise price was less than 100 percent of the value of the stock on the date shown in box 1 or was not fixed or determinable on that date.

No income is recognized when you exercise an option under an employee stock purchase plan. **However**, you must recognize (report) gain or loss on your tax return for the year in which you sell or otherwise dispose of the stock. Keep this form and use it to figure the gain or loss. For more information, see Pub. 525, Taxable and Nontaxable Income.

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

Box 1. Shows the date the option to purchase the stock was granted to you.

Box 2. Shows the date you exercised the option to purchase the stock.

Box 3. Shows the fair market value (FMV) per share on the date the option to purchase the stock was granted to you.

Box 4. Shows the FMV per share on the date you exercised the option to purchase the stock.

Box 5. Shows the price paid per share on the date you exercised the option to purchase the stock.

Box 6. Shows the number of shares to which legal title was transferred by you.

Box 7. Shows the date legal title of the shares was first transferred by you.

Box 8. If the exercise price per share was not fixed or determinable on the date entered in box 1, box 8 shows the exercise price per share determined as if the option was exercised on the date shown in box 1. If the exercise price per share was fixed or determinable on the date shown in box 1, then box 8 will be blank.

Account Number (see instructions)	1 — Date option granted	2 — Date option exercised	3 — Fair market value per share on grant date	4 — Fair market value per share on exercise date	5 — Exercise price paid per share	6 — No. of shares transferred	7 — Date legal title transferred	8 — Exercise price per share determined as if the option was exercised on the date shown in box 1.
KRN1Y89XZT	01/04/2021	03/31/2021	\$41.99	\$50.40	\$42.84	14	03/31/2021	\$35.69
KUV6FUE88T	04/01/2021	06/30/2021	\$51.13	\$67.50	\$57.38	11	06/30/2021	\$43.46
KY4KUY1PJR	07/01/2021	09/30/2021	\$68.40	\$68.87	\$58.54	10	09/30/2021	\$58.14



IMPORTANT TAX DOCUMENT

AUTOSCH 5-DIGIT 50263
35702 1 AV 0.423 Tr 97 Pt 3
173969-1.12 0 122-1.1 1oz



RAJESH MOGULOJU
1305 SE UNIVERSITY AVE UNIT 207
WAUKEE IA 50263



CORRECTED (if checked)

RECIPIENT'S/LENDER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. GREENSTATE CREDIT UNION 2355 LANDON RD NORTH LIBERTY IA 52317 (800)397-3790		* Caution: The amount shown may not be fully deductible by you. Limits based on the loan amount and the cost and value of the secured property may apply. Also, you may only deduct interest to the extent it was incurred by you, actually paid by you, and not reimbursed by another person.	OMB No. 1545-1380 2021 Form 1098	Mortgage Interest Statement Copy B For Payer/Borrower The information in boxes 1 through 9 and 11 is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if the IRS determines that an underpayment of tax results because you overstated a deduction for this mortgage interest or for these points, reported in boxes 1 and 6; or because you didn't report the refund of interest (box 4); or because you claimed a nondeductible item.
RECIPIENT'S/LENDER'S TIN 42-0804594		1 Mortgage interest received from payer(s)/borrower(s)* \$317.37	3 Mortgage origination date 01-08-2021	
PAYER'S/BORROWER'S TIN XXX-XX-7065		2 Outstanding mortgage principal \$	5 Mortgage insurance premiums \$	11 Mortgage acquisition date
PAYER'S/BORROWER'S name, street address (including apt. no.), city or town, state or province, country and ZIP or foreign postal code RAJESH MOGULOJU 1305 SE UNIVERSITY AVE UNIT 207 WAUKEE IA 50263		4 Refund of overpaid interest \$	6 Points paid on purchase of principal residence \$	
9 Number of properties securing the mortgage	10 Other	7 <input checked="" type="checkbox"/> If address of property securing mortgage is the same as PAYER'S/BORROWER'S address, the box is checked, or the address or description is entered in box 8.		
Account number (see instructions) 146729180002		8 Address or description of property securing mortgage		

Form 1098

(Keep for your records)

www.irs.gov/Form1098

Department of the Treasury - Internal Revenue Service

Instructions for Payer/Borrower

A person (including a financial institution, a governmental unit, and a cooperative housing corporation) who is engaged in a trade or business and, in the course of such trade or business, received from you at least \$600 of mortgage interest (including certain points) on any one mortgage in the calendar year must furnish this statement to you.

If you received this statement as the payer of record on a mortgage on which there are other borrowers, furnish each of the other borrowers with information about the proper distribution of amounts reported on this form. Each borrower is entitled to deduct only the amount he or she paid and points paid by the seller that represent his or her share of the amount allowable as a deduction. Each borrower may have to include in income a share of any amount reported in box 4.

If your mortgage payments were subsidized by a government agency, you may not be able to deduct the amount of the subsidy. See the Instructions for Schedule A, C, or E (Form 1040) for how to report the mortgage interest. Also, for more information, see Pub. 936 and Pub. 535.

Payer's/Borrower's taxpayer identification number (TIN). For your protection, this form may show only the last four digits of your TIN (SSN, ITIN, ATIN, or EIN). However, the issuer has reported your complete TIN to the IRS.

Account number. May show an account or other unique number the lender has assigned to distinguish your account.

Box 1. Shows the mortgage interest received by the recipient/lender during the year. This amount includes interest on any obligation secured by real property, including a mortgage, home equity loan, or line of credit. This amount does not include points, government subsidy payments, or seller payments on a "buydown" mortgage. Such amounts are deductible by you only in certain circumstances.

CAUTION If you prepaid interest in 2021 that accrued in full by January 15, 2022, this prepaid interest may be included in box 1. However, you cannot deduct the prepaid amount in 2021 even though it may be included in box 1.

If you hold a mortgage credit certificate and can claim the mortgage interest credit, see Form 8396. If the interest was paid on a mortgage, home equity loan, or line of credit secured by a qualified residence, you can only deduct the interest paid on acquisition indebtedness, and you may be

subject to a deduction limitation.

Box 2. Shows the outstanding principal on the mortgage as of January 1, 2021. If the mortgage originated in 2021, shows the mortgage principal as of the date of origination. If the recipient/lender acquired the loan in 2021, shows the mortgage principal as of the date of acquisition.

Box 3. Shows the date of the mortgage origination.

Box 4. Do not deduct this amount. It is a refund (or credit) for overpayment(s) of interest you made in a prior year or years. If you itemized deductions in the year(s) you paid the interest, you may have to include part or all of the box 4 amount on the "Other Income" line of your 2021 Schedule 1 (Form 1040). No adjustment to your prior year(s) tax return(s) is necessary. For more information, see Pub. 936 and *Itemized Deduction Recoveries* in Pub. 525.

Box 5. If an amount is reported in this box, it may qualify to be treated as deductible mortgage interest. See the 2021 Schedule A (Form 1040) instructions and Pub. 936.

Box 6. Not all points are reportable to you. Box 6 shows points you or the seller paid this year for the purchase of your principal residence that are required to be reported to you. Generally, these points are fully deductible in the year paid, but you must subtract seller-paid points from the basis of your residence. Other points not reported in box 6 may also be deductible. See Pub. 936 to figure the amount you can deduct.

Box 7. If the address of the property securing the mortgage is the same as the payer's/borrower's, either the box has been checked, or box 8 has been completed.

Box 8. Shows the address or description of the property securing the mortgage.

Box 9. If more than one property secures the loan, shows the number of properties securing the mortgage. If only one property secures the loan, this box may be blank.

Box 10. The interest recipient may use this box to give you other information, such as real estate taxes or insurance paid from escrow.

Box 11. If the recipient/lender acquired the mortgage in 2021, shows the date of acquisition.

Future developments. For the latest information about developments related to Form 1098 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/Form1098.

FreeFile. Go to www.irs.gov/FreeFile to see if you qualify for no-cost online federal tax preparation, e-filing, and direct deposit or payment options.

GREENSTATE CREDIT UNION
2355 LONDON RD
NORTH LIBERTY IA 52317

IMPORTANT TAX DOCUMENT

AUTOSCH 5-DIGIT 50263
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173969-1.12 0 121-1.1 1oz



RAJESH MOGULOJU
1305 SE UNIVERSITY AVE UNIT 207
WAUKEE IA 50263



CORRECTED (if checked)

RECIPIENT'S/LENDER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. GREENSTATE CREDIT UNION 2355 LONDON RD NORTH LIBERTY IA 52317 (800)397-3790		* Caution: The amount shown may not be fully deductible by you. Limits based on the loan amount and the cost and value of the secured property may apply. Also, you may only deduct interest to the extent it was incurred by you, actually paid by you, and not reimbursed by another person.		OMB No: 1545-1380 2021 Form 1098		Mortgage Interest Statement Copy B For Payer/Borrower The information in boxes 1 through 9 and 11 is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if the IRS determines that an underpayment of tax results because you overstated a deduction for this mortgage interest or for these points, reported in boxes 1 and 6; or because you didn't report the refund of interest (box 4); or because you claimed a nondeductible item.
RECIPIENT'S/LENDER'S TIN 42-0804594		PAYER'S/BORROWER'S TIN XXX-XX-7065		1 Mortgage interest received from payer(s)/borrower(s)* \$317.95		
RECIPIENT'S/LENDER'S name, street address (including apt. no.), city or town, state or province, country and ZIP or foreign postal code RAJESH MOGULOJU 1305 SE UNIVERSITY AVE UNIT 207 WAUKEE IA 50263		2 Outstanding mortgage principal \$606.29		3 Mortgage origination date 11-19-2020		
9 Number of properties securing the mortgage		10 Other		4 Refund of overpaid interest \$		
Account number (see instructions) 146729180001		5 Mortgage insurance premiums \$		6 Points paid on purchase of principal residence \$		
		7 <input checked="" type="checkbox"/> If address of property securing mortgage is the same as PAYER'S/BORROWER'S address, the box is checked, or the address or description is entered in box 8.		8 Address or description of property securing mortgage		
				11 Mortgage acquisition date		

Form 1098

(Keep for your records)

www.irs.gov/Form1098

Department of the Treasury - Internal Revenue Service

Instructions for Payer/Borrower

A person (including a financial institution, a governmental unit, and a cooperative housing corporation) who is engaged in a trade or business and, in the course of such trade or business, received from you at least \$600 of mortgage interest (including certain points) on any one mortgage in the calendar year must furnish this statement to you.

If you received this statement as the payer of record on a mortgage on which there are other borrowers, furnish each of the other borrowers with information about the proper distribution of amounts reported on this form. Each borrower is entitled to deduct only the amount he or she paid and points paid by the seller that represent his or her share of the amount allowable as a deduction. Each borrower may have to include in income a share of any amount reported in box 4.

If your mortgage payments were subsidized by a government agency, you may not be able to deduct the amount of the subsidy. See the Instructions for Schedule A, C, or E (Form 1040) for how to report the mortgage interest. Also, for more information, see Pub. 936 and Pub. 535.

Payer's/Borrower's taxpayer identification number (TIN). For your protection, this form may show only the last four digits of your TIN (SSN, ITIN, ATIN, or EIN). However, the issuer has reported your complete TIN to the IRS.

Account number. May show an account or other unique number the lender has assigned to distinguish your account.

Box 1. Shows the mortgage interest received by the recipient/lender during the year. This amount includes interest on any obligation secured by real property, including a mortgage, home equity loan, or line of credit. This amount does not include points, government subsidy payments, or seller payments on a "buydown" mortgage. Such amounts are deductible by you only in certain circumstances.



If you prepaid interest in 2021 that accrued in full by January 15, 2022, this prepaid interest may be included in box 1. However, you cannot deduct the prepaid amount in 2021 even though it may be included in box 1.

If you hold a mortgage credit certificate and can claim the mortgage interest credit, see Form 8396. If the interest was paid on a mortgage, home equity loan, or line of credit secured by a qualified residence, you can only deduct the interest paid on acquisition indebtedness, and you may be

subject to a deduction limitation.

Box 2. Shows the outstanding principal on the mortgage as of January 1, 2021. If the mortgage originated in 2021, shows the mortgage principal as of the date of origination. If the recipient/lender acquired the loan in 2021, shows the mortgage principal as of the date of acquisition.

Box 3. Shows the date of the mortgage origination.

Box 4. Do not deduct this amount. It is a refund (or credit) for overpayment(s) of interest you made in a prior year or years. If you itemized deductions in the year(s) you paid the interest, you may have to include part or all of the box 4 amount on the "Other income" line of your 2021 Schedule 1 (Form 1040). No adjustment to your prior year(s) tax return(s) is necessary. For more information, see Pub. 936 and *Itemized Deduction Recoveries* in Pub. 525.

Box 5. If an amount is reported in this box, it may qualify to be treated as deductible mortgage interest. See the 2021 Schedule A (Form 1040) Instructions and Pub. 936.

Box 6. Not all points are reportable to you. Box 6 shows points you or the seller paid this year for the purchase of your principal residence that are required to be reported to you. Generally, these points are fully deductible in the year paid, but you must subtract seller-paid points from the basis of your residence. Other points not reported in box 6 may also be deductible. See Pub. 936 to figure the amount you can deduct.

Box 7. If the address of the property securing the mortgage is the same as the payer's/borrower's, either the box has been checked, or box 8 has been completed.

Box 8. Shows the address or description of the property securing the mortgage.

Box 9. If more than one property secures the loan, shows the number of properties securing the mortgage. If only one property secures the loan, this box may be blank.

Box 10. The interest recipient may use this box to give you other information, such as real estate taxes or insurance paid from escrow.

Box 11. If the recipient/lender acquired the mortgage in 2021, shows the date of acquisition.

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GREENSTATE CREDIT UNION
2355 LONDON RD
NORTH LIBERTY IA 52317

IMPORTANT TAX DOCUMENT

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MOGULOJU RAJESH
1305 SE UNIVERSITY AVE, UNIT 207
WAUKEE IA 50263



CORRECTED (if checked)

RECIPIENT'S/LENDER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. GREENSTATE CREDIT UNION 2355 LONDON RD NORTH LIBERTY IA 52317 (319)339-1000		* Caution: The amount shown may not be fully deductible by you. Limits based on the loan amount and the cost and value of the secured property may apply. Also, you may only deduct interest to the extent it was incurred by you, actually paid by you, and not reimbursed by another person.	OMB No. 1545-1380 2021 Form 1098	Mortgage Interest Statement Copy B For Payer/Borrower The information in boxes 1 through 9 and 11 is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if the IRS determines that an underpayment of tax results because you overstated a deduction for this mortgage interest or for these points, reported in boxes 1 and 6; or because you didn't report the refund of interest (box 4); or because you claimed a nondeductible item.
RECIPIENT'S/LENDER'S TIN 42-0804594		PAYER'S/BORROWER'S TIN XXX-XX-7065		
RECIPIENT'S/LENDER'S name, street address (including apt. no.), city or town, state or province, country and ZIP or foreign postal code MOGULOJU RAJESH 1305 SE UNIVERSITY AVE, UNIT 207 WAUKEE IA 50263		1 Mortgage interest received from payer(s)/borrower(s)* \$4,087.66	2 Outstanding mortgage principal \$145,350.00	3 Mortgage origination date 10-12-2020
PAYER'S/BORROWER'S name, street address (including apt. no.), city or town, state or province, country and ZIP or foreign postal code MOGULOJU RAJESH 1305 SE UNIVERSITY AVE, UNIT 207 WAUKEE IA 50263		4 Refund of overpaid interest \$	5 Mortgage insurance premiums \$1,085.28	
9 Number of properties securing the mortgage 10		10 Other Other		6 Points paid on purchase of principal residence \$
Account number (see instructions) 8880174017		7 <input type="checkbox"/> If address of property securing mortgage is the same as PAYER'S/BORROWER'S address, the box is checked, or the address or description is entered in box 8.		8 Address or description of property securing mortgage 1305 SE UNIVERSITY AVE, UNIT 207 WAUKEE IA 50263 TAX PAID:1,262.00
		11 Mortgage acquisition date		

Form 1098

(Keep for your records)

www.irs.gov/Form1098

Department of the Treasury - Internal Revenue Service

Instructions for Payer/Borrower

A person (including a financial institution, a governmental unit, and a cooperative housing corporation) who is engaged in a trade or business and, in the course of such trade or business, received from you at least \$600 of mortgage interest (including certain points) on any one mortgage in the calendar year must furnish this statement to you.

If you received this statement as the payer of record on a mortgage on which there are other borrowers, furnish each of the other borrowers with information about the proper distribution of amounts reported on this form. Each borrower is entitled to deduct only the amount he or she paid and points paid by the seller that represent his or her share of the amount allowable as a deduction. Each borrower may have to include in income a share of any amount reported in box 4.

If your mortgage payments were subsidized by a government agency, you may not be able to deduct the amount of the subsidy. See the instructions for Schedule A, C, or E (Form 1040) for how to report the mortgage interest. Also, for more information, see Pub. 936 and Pub. 535.

Payer's/Borrower's taxpayer identification number (TIN). For your protection, this form may show only the last four digits of your TIN (SSN, ITIN, ATIN, or EIN). However, the issuer has reported your complete TIN to the IRS.

Account number. May show an account or other unique number the lender has assigned to distinguish your account.

Box 1. Shows the mortgage interest received by the recipient/lender during the year. This amount includes interest on any obligation secured by real property, including a mortgage, home equity loan, or line of credit. This amount does not include points, government subsidy payments, or seller payments on a "buydown" mortgage. Such amounts are deductible by you only in certain circumstances.

CAUTION If you prepaid interest in 2021 that accrued in full by January 15, 2022, this prepaid interest may be included in box 1. However, you cannot deduct the prepaid amount in 2021 even though it may be included in box 1.

If you hold a mortgage credit certificate and can claim the mortgage interest credit, see Form 8396. If the interest was paid on a mortgage, home equity loan, or line of credit secured by a qualified residence, you can only deduct the interest paid on acquisition indebtedness, and you may be

subject to a deduction limitation.

Box 2. Shows the outstanding principal on the mortgage as of January 1, 2021. If the mortgage originated in 2021, shows the mortgage principal as of the date of origination. If the recipient/lender acquired the loan in 2021, shows the mortgage principal as of the date of acquisition.

Box 3. Shows the date of the mortgage origination.

Box 4. Do not deduct this amount. It is a refund (or credit) for overpayment(s) of interest you made in a prior year or years. If you itemized deductions in the year(s) you paid the interest, you may have to include part or all of the box 4 amount on the "Other Income" line of your 2021 Schedule 1 (Form 1040). No adjustment to your prior year(s) tax return(s) is necessary. For more information, see Pub. 936 and *Itemized Deduction Recoveries* in Pub. 525.

Box 5. If an amount is reported in this box, it may qualify to be treated as deductible mortgage interest. See the 2021 Schedule A (Form 1040) Instructions and Pub. 936.

Box 6. Not all points are reportable to you. Box 6 shows points you or the seller paid this year for the purchase of your principal residence that are required to be reported to you. Generally, these points are fully deductible in the year paid, but you must subtract seller-paid points from the basis of your residence. Other points not reported in box 6 may also be deductible. See Pub. 936 to figure the amount you can deduct.

Box 7. If the address of the property securing the mortgage is the same as the payer's/borrower's, either the box has been checked, or box 8 has been completed.

Box 8. Shows the address or description of the property securing the mortgage.

Box 9. If more than one property secures the loan, shows the number of properties securing the mortgage. If only one property secures the loan, this box may be blank.

Box 10. The interest recipient may use this box to give you other information, such as real estate taxes or insurance paid from escrow.

Box 11. If the recipient/lender acquired the mortgage in 2021, shows the date of acquisition.

Future developments. For the latest information about developments related to Form 1098 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/Form1098.

FreeFile. Go to www.irs.gov/FreeFile to see if you qualify for no-cost online federal tax preparation, e-filing, and direct deposit or payment options.



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

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RAJESH MOGULOJU
1305 SE UNIVERSITY AVE UNIT 207
WAUKEE, IA 50263-8465



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

Dear RAJESH:

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 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 optumbank.com to access your HSA or call 1-866-234-8913.

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
TRUSTEE'S federal identification number 470858534		2 Total contributions made in 2021 \$ 1,580.00	3 Total HSA or Archer MSA contributions made in 2022 for 2021 \$ 0.00	
PARTICIPANT'S name RAJESH MOGULOJU Street address (including apt. no.) 1305 SE UNIVERSITY AVE UNIT 207 City or town, state or province, country, and ZIP or foreign postal code WAUKEE IA 50263-0000		4 Rollover contributions \$ 0.00	5 Fair market value of HSA, Archer MSA, or MA MSA \$ 1,275.80	Copy B For Participant This information is being furnished to the Internal Revenue Service.
Account number (see instructions) 417891159		6 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA <input type="checkbox"/> MSA <input type="checkbox"/>		

Form 5498-SA

(keep for your records)

www.irs.gov/form5498sa

Department of the Treasury - Internal Revenue Service



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

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

Dear RAJESH:

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 optumbank.com to access your HSA or call 1-866-234-8913.

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 *****7065	1 Gross distribution \$ 295.29	2 Earnings on excess cont. \$ 0	
RECIPIENT'S name RAJESH MOGULOJU Street address (including apt. no.) 1305 SE UNIVERSITY AVE UNIT 207 City or town, state or province, country, and ZIP or foreign postal code WAUKEE IA 50263-0000		3 Distribution code 1	4 FMV on date of death \$ 0	
Account number (see instructions) 417891159		5 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA MSA <input type="checkbox"/>		
Form 1099-SA		(keep for your records)	www.irs.gov/form1099sa	Department of the Treasury - Internal Revenue Service