



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

0190FSTXR0016004-17966-01

AKASH CHATTERJEE
21228 ILAVISTA WAY
LAKEVILLE MN 55044-1903

Important IRS Tax Form 5498-SA

Dear AKASH:

The enclosed IRS tax form 5498-SA shows your 2022 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 sign 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 2022 including those made in 2022 for 2021, if applicable.
- You have until the tax filing deadline of this year to submit contributions for 2022. If you make any contributions in 2023 before the tax deadline for 2022 you will receive an updated 5498-SA in May.
- To get your total contributions for 2022 add Box 2 plus Box 3. Please note if you made any contributions in 2022 for 2021 you need to review your updated 5498 for 2021 and subtract that from Box 3.
- The Fair Market Value consists of your HSA cash balance and any investment balance as of 12/31/2022.
- If you had a reportable distribution for 2022, you'll also get tax form 1099-SA. If you did not use (no distributions) your HSA in 2022 you will not get a 1099-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 sign 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 2022 and 2023 for 2022 \$ 0	OMB No. 1545-1518 2022	HSA, Archer MSA, or Medicare Advantage MSA Information
		2 Total contributions made in 2022 \$ 3999.88	Form 5498-SA	
TRUSTEE'S federal identification number 470858534	PARTICIPANT'S social security number *****9291	3 Total HSA or Archer MSA contributions made in 2023 for 2022 \$ 0.00		Copy B For Participant This information is being furnished to the Internal Revenue Service.
PARTICIPANT'S name AKASH CHATTERJEE		4 Rollover contributions \$ 0.00	5 Fair market value of HSA, Archer MSA, or MA MSA \$ 3321.29	
Street address (including apt. no.) 21228 ILAVISTA WAY		6 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA <input type="checkbox"/> MSA <input type="checkbox"/>		
City or town, state or province, country, and ZIP or foreign postal code LAKEVILLE MN 55044-1903		Account number (see instructions) 418712871		

Form 5498-SA

(keep for your records)

www.irs.gov/form5498sa

Department of the Treasury - Internal Revenue Service

Optum Financial®

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AKASH CHATTERJEE
21228 ILAVISTA WAY
LAKEVILLE MN 55044-1903

Important IRS Tax Form 1099-SA

Dear AKASH:

This enclosed IRS tax form 1099-SA shows your 2022 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 sign in at [irs.gov](https://www.irs.gov) and navigate to Forms and Publications.

Here's what you need to know:

- Box 1 includes your total distributions for 2022.
- 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 2022. 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 1/1/2023 are reflected on this form. However, any corrections processed in 2023 will cause a corrected tax document to be generated shortly.
- If you had any contributions that apply to 2022, 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 sign 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 2022 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 *****9291	1 Gross distribution \$ 1577.38	2 Earnings on excess cont. \$ 0	
RECIPIENT'S name AKASH CHATTERJEE Street address (including apt. no.) 21228 ILAVISTA WAY City or town, state or province, country, and ZIP or foreign postal code LAKEVILLE MN 55044-1903		3 Distribution code 1	4 FMV on date of death \$ 0	
Account number (see instructions) 418712871		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