

Optum Financial®

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

PAVANKUMAR ALAPATI
29 HARTWELL BROOK DR
NASHUA NH 03060-5074

Important IRS Tax Form 1099-SA

Dear PAVANKUMAR:

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 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 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 2022 Form 1099-SA	
PAYER'S federal identification number 470858534	RECIPIENT'S identification number *****8220	1 Gross distribution \$ 973.14	2 Earnings on excess cont. \$ 0
RECIPIENT'S name PAVANKUMAR ALAPATI Street address (including apt. no.) 29 HARTWELL BROOK DR City or town, state or province, country, and ZIP or foreign postal code NASHUA NH 03060-0000		3 Distribution code 1	4 FMV on date of death \$ 0
Account number (see instructions) 419255973		5 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA <input type="checkbox"/> MSA <input type="checkbox"/>	

Distributions
From an HSA,
Archer MSA, or
Medicare Advantage
MSA

Copy B
For
Recipient

This information
is being furnished
to the Internal
Revenue Service.

Form 1099-SA

(keep for your records)

www.irs.gov/form1099sa

Department of the Treasury - Internal Revenue Service