

# Optum Financial®



P.O. Box 622337 | Orlando, FL 32862-2337

0190FSTXR0023003-32076-01  
 KARAN BALKRISHN ADAP  
 12217 131ST PL NE APT B022  
 KIRKLAND WA 98034-8054

## Important IRS Tax Form 5498-SA

Dear KARAN BALKRISHN:

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](https://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, navigate to "Settings and Preferences" and select "Communication Preferences". From there, click the "HSA Communication and Notification" link and select the "email" option to update your communication preferences.

CORRECTED (if checked)

TRUSTEE'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number  ConnectYourCare P.O. Box 622337 Orlando FL 32862-2337		1 Employee or self-employed person's Archer MSA contributions made in 2022 and 2023 for 2022 \$ 0	OMB No. 1545-1518  2022  Form <b>5498-SA</b>	HSA, Archer MSA, or Medicare Advantage MSA Information
TRUSTEE'S federal identification number 261274092		2 Total contributions made in 2022 \$ 1460.00	3 Total HSA or Archer MSA contributions made in 2023 for 2022 \$0.00	
PARTICIPANT'S name KARAN BALKRISHN ADAP  Street address (including apt. no.) 12217 131ST PLACE NE B022  City or town, state or province, country, and ZIP or foreign postal code KIRKLAND WA 98034		4 Rollover contributions \$ 0.00	5 Fair market value of HSA, Archer MSA, or MA MSA \$ 2220.27	Copy B  For Participant  This information is being furnished to the Internal Revenue Service.
PARTICIPANT'S social security number *****5354		6 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA MSA <input type="checkbox"/>	Account number (see instructions) 016503773545	

Form 5498-SA

(keep for your records)

[www.irs.gov/form5498sa](https://www.irs.gov/form5498sa)

Department of the Treasury - Internal Revenue Service