

WealthCare Saver Prime  
 PO Box 162177  
 Altamonte Springs, FL 32716

ID# 601014841894



004358  
 0101

VARUN PODAMALA  
 5 COTTRELL CT  
 OLD BRIDGE, NJ 08857

CORRECTED (if checked)

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

TRUSTEE'S/PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number Alegeus Tech, LLC dba WealthCare Saver 1601 Trapelo Road Waltham, MA 02451 1-866-287-5675		OMB No. 1545-1517  Form <b>1099-SA</b> (Rev. November 2019)  For calendar year 2023	
PAYER'S TIN 90-0808825	RECIPIENT'S TIN XXX-XX-6180	1. Gross Distribution \$1,238.26	2. Earnings on excess cont. \$0.00
RECIPIENT'S name VARUN PODAMALA  Street address (including apt. no.) 5 COTTRELL CT  City or town, state or province, country, and ZIP or foreign postal code OLD BRIDGE, NJ 08857		3. Distribution code  1  5. HSA           X Archer MSA    O MA MSA        O	4. FMV on date of death  \$0.00
Account number (see instructions) 601014841894			

**Copy B  
 For  
 Recipient**

This information  
 is being furnished  
 to the IRS.

Form 1099-SA (Rev. 11-2019)      (keep for your records)      www.irs.gov/Form1099SA      Department of the Treasury - Internal Revenue Service

**Instructions for Recipient**

Distributions from a health savings account (HSA), Archer medical savings account (MSA), or Medicare Advantage (MA) MSA are reported to you on Form 1099-SA. File Form 8853 or Form 8889 with your Form 1040 or 1040-SR to report a distribution from these accounts even if the distribution isn't taxable. The payer isn't required to compute the taxable amount of any distribution.

An HSA or Archer MSA distribution isn't taxable if you used it to pay qualified medical expenses of the account holder or eligible family member or you rolled it over. An HSA may be rolled over to another HSA; an Archer MSA may be rolled over to another Archer MSA or an HSA. An MA MSA isn't taxable if you used it to pay qualified medical expenses of the account holder only. If you didn't use the distribution from an HSA, Archer MSA, or MA MSA to pay for qualified medical expenses, or in the case of an HSA or Archer MSA, you didn't roll it over, you must include the distribution in your income (see Form 8853 or Form 8889). Also, you may owe a penalty.

You may repay a mistaken distribution from an HSA no later than April 15 following the first year you knew or should have known the distribution was a mistake, providing the trustee allows the repayment.

For more information, see the Instructions for Form 8853 and the Instructions for Form 8889. Also see Pub. 969.

**Recipient'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 identification number to the IRS.

**Spouse beneficiary.** If you inherited an Archer MSA or MA MSA because of the death of your spouse, special rules apply. See the Instructions for Form 8853. If you inherited an HSA because of the death of your spouse, see the Instructions for Form 8889.

**Estate beneficiary.** If the HSA, Archer MSA, or MA MSA account holder dies and the estate is the beneficiary, the fair market value (FMV) of the account on the date of death is includible in the account holder's gross income. Report the amount on the account holder's final income tax return.

**Nonspouse beneficiary.** If you inherited the HSA, Archer MSA, or MA MSA from someone who wasn't your spouse, you must report as income on your tax return the FMV of the account as of the date of death. Report the FMV on your tax return for the year the account owner died even if you received the distribution from the account in a later year. See the Instructions for Form 8853 or the Instructions for Form 8889. Any earnings on the account after the date of death (box 1 minus box 4 of Form 1099-SA) are taxable. Include the earnings on the "Other income" line of your tax return.

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

**Box 1.** Shows the amount received this year. The amount may have been a direct payment to the medical service provider or distributed to you.

**Box 2.** Shows the earnings on any excess contributions you withdrew from an HSA or Archer MSA by the due date of your income tax return. If you withdrew the excess, plus any earnings, by the due date of your income tax return, you must include the earnings in your income in the year you received the distribution even if you used it to pay qualified medical expenses. This amount is included in box 1. Include the earnings on the "Other income" line of your tax return. An excise tax of 6% for each tax year is imposed on you for excess individual and employer contributions that remain in the account. See Form 5329, Additional Taxes on Qualified Plans (Including IRAs) and Other Tax-Favored Accounts.

**Box 3.** These codes identify the distribution you received: 1-Normal distribution, 2-Excess contributions; 3-Disability; 4-Death distribution other than code 6; 5-Prohibited transaction; 6-Death distribution after year of death to a nonspouse beneficiary.

**Box 4.** If the account holder died, shows the FMV of the account on the date of death.

**Box 5.** Shows the type of account that is reported on this Form 1099-SA.

**Future developments.** For the latest information about developments related to Form 1099-SA and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/Form1099SA](http://www.irs.gov/Form1099SA).

RECIPIENT'S/LENDER'S name, address, and telephone no.

MEMBER FIRST MORTGAGE, LLC  
616 44TH ST. SE  
GRAND RAPIDS, MI 49548

1-866-636-1052

**\*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

2023

Form 1098

CORRECTED (if checked)

### Mortgage Interest Statement

RECIPIENT'S/LENDER'S TIN

38-3616059

PAYER'S/BORROWER'S TIN

\*\*\*-\*\*-6180

PAYER S/BORROWER'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code  
+ 2127330 000001213 9030



VARUN, KUMAR REDDY PODAMALA  
5 COTTRELL CT  
OLD BRIDGE NJ 08857-3275

1.213



9 Number of properties securing the mortgage

01

10 Other

BEGINNING PRIN BAL 550,800.00  
PRINCIPAL PAID 561.57  
ENDING PRINCIPAL BAL 550,238.43

Account number (see instructions)

0020049312

11 Mortgage acquisition date

1 Mortgage interest received from payer(s)/borrower(s)\*  
\$ 3,849.20

2 Outstanding mortgage principal  
\$ 550,800.00

3 Mortgage origination date  
10/19/2023

4 Refund of overpaid interest  
\$ .00

5 Mortgage insurance premiums  
\$ 477.36

6 Points paid on purchase of principal residence  
\$ .00

7 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

5 COTTRELL CT  
OLD BRIDGE NJ 08857-3275

### Copy B For Payer/Borrower

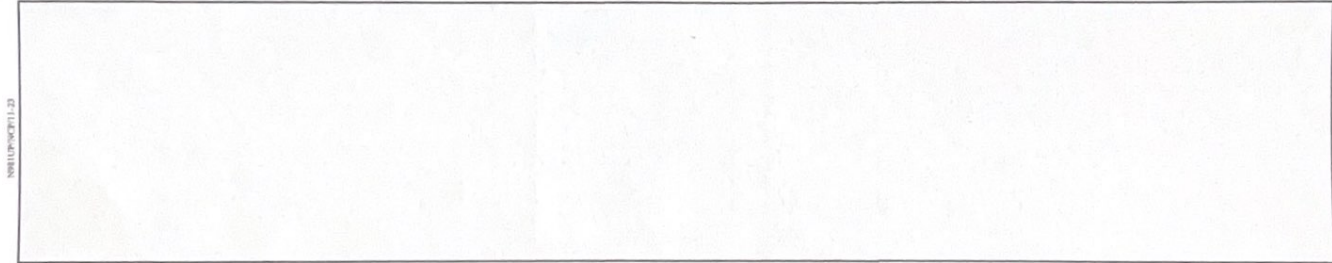
The information in boxes 1 through 9 and 11 is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if the IRS determines that an underpayment of tax results because you overstated a deduction for 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.

Form 1098

(Keep for your records)

www.irs.gov/Form1098

Department of the Treasury - Internal Revenue Service



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