



0190FSTXR0017003-20731-01
 SUDHA BASKAR
 289 KRAEMER CT
 EAST BRUNSWICK NJ 08816-5853

Important IRS Tax Form 1099-SA

Dear SUDHA:

This enclosed IRS tax form 1099-SA shows your 2023 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 find a copy of IRS tax form 8889, visit [irs.gov](https://www.irs.gov).

Here's what you need to know:

- Box 1 includes your total distributions for 2023.
- 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 2023. 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 1/1/2024 are reflected on this form. However, any corrections processed in 2024 will cause a corrected tax document to be generated shortly.
- If you had any contributions that apply to 2023, you'll also get tax form 5498-SA.

Ready to say goodbye to printed forms? Sign in to your account and navigate to "Account Management." From there, scroll to "Communication Preferences" and select "Edit." Select the "Online" option to update your tax form delivery preference.

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		PAYER'S federal identification number 470858534	
RECIPIENT'S name SUDHA BASKAR		RECIPIENT'S identification number *****9229	
Street address (including apt. no.): 289 KRAEMER CT EAST BRUNSWICK NJ 08816-0000		City or town, state or province, country, and ZIP or foreign postal code EAST BRUNSWICK NJ 08816-0000	
Account number (see instructions) 419256645		Form 1099-SA Department of the Treasury - Internal Revenue Service www.irs.gov/form1099sa (Keep for your records)	

Distributions From an HSA, Archer MSA, or Medicare Advantage MSA Form 1099-SA 2023 OMB No. 1545-1517		1 Gross distribution \$ 2,944.09	
2 Earnings on excess cont. \$ 0		3 Distribution code 1	
4 FMV on date of death \$ 0		5 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA MSA <input type="checkbox"/>	
Recipient's name SUDHA BASKAR		City or town, state or province, country, and ZIP or foreign postal code EAST BRUNSWICK NJ 08816-0000	
Street address (including apt. no.): 289 KRAEMER CT EAST BRUNSWICK NJ 08816-0000		Account number (see instructions) 419256645	

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Form 1099-SA
 Department of the Treasury - Internal Revenue Service
 www.irs.gov/form1099sa
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Distributions From an HSA, Archer MSA, or Medicare Advantage MSA
 Form 1099-SA 2023
 OMB No. 1545-1517

1 Gross distribution
 \$ 2,944.09

2 Earnings on excess cont.
 \$ 0

3 Distribution code
 1

4 FMV on date of death
 \$ 0

5 HSA Archer MSA MA MSA

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EAST BRUNSWICK NJ 08816-5853

Important IRS Tax Form 5498-SA

Dear SUDHA:

The enclosed IRS tax form 5498-SA shows your 2023 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 find a copy of IRS tax form 8889, visit irs.gov.

Here's what you need to know:

- Box 2 shows your total contributions made for 2023 including those made in 2023 for 2022, if applicable.
- You have until the tax filing deadline of this year to submit contributions for 2023. If you make any contributions in 2024 before the tax deadline for 2023 you will receive an updated 5498-SA in May.
- To get your total contributions for 2023 add Box 2 plus Box 3. Please note if you made any contributions in 2023 for 2022 you need to review your updated 5498 for 2022 and subtract that from Box 3.
- The Fair Market Value consists of your HSA cash balance and any investment balance as of 12/31/2023.
- If you had a reportable distribution for 2023, you'll also get tax form 1099-SA. If you did not use (no distributions) your HSA in 2023 you will not get a 1099-SA.

Ready to say goodbye to printed forms? Sign in to your account and navigate to "Account Management." From there, scroll to "Communication Preferences" and select the "Edit." Select the "Online" option to update your tax form delivery preference.

Questions? Please sign in at myuhc.com to access your HSA or call 1-800-791-9361.

CORRECTED (if checked)

1 Employee or self-employed person's Archer MSA contributions made in 2023 and 2024 for 2023	\$ 0
2 Total contributions made in 2023	\$ 5,200.00
3 Total HSA or Archer MSA contributions made in 2024	for 2023 \$0.00
4 Rollover contributions	5 Fair market value of HSA, Archer MSA, or MA MSA
5 Fair market value of HSA, Archer MSA, or MA MSA	\$ 3,068.01
6 HSA Archer MSA MA MSA	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

2023
Form **5498-SA**
OMB No. 1545-1518

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For Participant

This information is being furnished to the Internal Revenue Service.