-	7 Distribution code(s) SEP/	de 6 Net unrealized appreciation in employer's securities	ce, country
8 Other	-	€	
5 Employee contributions or /Designated Roth contributions or insurance premiums	4 Federal income tax withheld	3 Capital gain (included in box 2a)	PAYER'S TIN RECIPIENT'S TIN
Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	OMB No. 1545-0119 2023 Form 1099-R Total X	1 Gross distribution \$ 33,481.36 2a Taxable amount \$ 0.00 2b Taxable amount not determined	Form 1099-R CORRECTED (if checked) PAYERS name, street address, city or town, state or province, courtry, ZIP or foreign postal code, and telephone no. NATIKIX TRUST COMPANY WIRRO LIMITED 4011(N) PLAN - CTRL A/C P.O. BOX 52129 PHOEMIX, AS 85072-2129
<u>.</u>	Department of the Treasury		Assura mu, care pis or it are rise. The second form 1099R anades set, present. units.
Je 1 e -	18 Name of locality	17 Local tax withheld	Copy B 13 Date of payment 12 FATCA 10 Amount allocable to IRR within 5 years as ware 1 payment 1
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Plans, IRAs, Insurance	Form 1099-R		HIGHOLIMILED POLICY FAMILY P.O. BOX 52129 PHOENIX. AZ 85072-2129
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16 State distribution	% \$ 15 State/Payer's state no.	14 State tax withheld	
e contributions	oution 9b Total employee	9a Your percentage of total distribution	11629 SINGLE LEAF DRIVE FRISCO, TX 75035
8 Other	7 Distribution code(s) IRA/ SEP/ SIMPLE	6 Net unrealized appreciation in employer's securities	el address (incl. apl. ro.), city or town, APPA
insurance premiums		s in box 2a)	75-3182674 XXX-XX-5935
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Insurance		\$ 0.00 2b Taxable amount	
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Distributions From Pensions, Annuities,	119	1 Gross distribution	Form 1099-R CORRECTED (if checked) PAYERS name, street address, city or town, state or province, country, ZP or toreign postal code, and telephone no.
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P.O. Box 271629 | Salt Lake City, UT 84127-1629

SAHANA BASAPPA 11629 SINGLE LEAF DR FRISCO TX 75035-1768

Important IRS Tax Form 5498-SA

Dear SAHANA:

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
- 2024 before the tax deadline for 2023 you will receive an updated 5498-SA in May. You have until the tax filing deadline of this year to submit contributions for 2023. If you make any contributions in
- 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 "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.

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TRUSTEE'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number	ovince,	1 Employee or self-employed person's Archer MSA	OMB No. 1545-1518	
		contributions made in 2023		エクトレスプラマスクト
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Optum Bank		\$ 0	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	or Negicare
P.O. Box 271629				Advantage NSA
Salt Lake City UT 84127-1629		7 Total contributions made in 2000)	
		\$ 5,506.68	Form 5498-SA	
deral identification number	PARTICIPANT'S social security number	3 Total HSA or Archer MSA contributions made in 2024	tions made in 2024	
	5935	for 2023 \$472.96		Сорув
PARTICIPANT'S name		4 Rollover contributions	5 Fair market value of HSA.	anutra
SAHANA BASAPPA		reživkojecuju	Archer MSA, or MA MSA	7+22×2×1
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Form 5498-SA	(keep for your re-	(keep for your records) www.irs.gov/form5498sa	Denariment of the Treasury	unt Information Dougness Constitution



Optum Financial

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

0190FSTXR0031004-03186-01 SAHANA BASAPPA 11629 SINGLE LEAF DR FRISCO TX 75035-1768

Important IRS Tax Form 1099-SA

Dear SAHANA:

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.

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.
- descriptions please contact a tax professional 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 Box 3 shows the distribution code. Different codes will display depending on the situation. Code 1 summarizes all
- in 2024 will cause a corrected tax document to be generated shortly. Any corrections processed before 1/1/2024 are reflected on this form. However, any corrections processed
- 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.

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TRUSTEE'S/PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number		OMB No. 1545-1517	Distributions
Onlum Rank		2023	From an HSA, Archer MSA, or
P.O. Box 271629			Medicare Advantage
Salt Lake City UT 84127-1629		Form 1099-SA	MSA
PAYER'S federal identification number RECIPIENTS identification number	1 Gross distribution	2 Earnings on excess cont.	Copy B
470858534	\$ 256.22	\$0	For
RECIPIENT'S name SAHANA BASAPPA	3 Distribution code	4 FWV on date of death	Recipient
Street address (including apt. no.)		\$0	
11629 SINGLE LEAF DR	5 HSA		
City or town, state or province, country, and ZIP or foreign postal code	Archer MSA		This information is being furnished
FRISCO TX 75035-1768	MA MSA		to the Internal Revenue Service.
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Form 1099-SA

(keep for your records)

www.irs.gov/form1099sa

Department of the Treasury - Internal Revenue Service