

11629 SINGLE LEAF DRIVE
FRISCO, TX 75035

Account number (see instructions) 11 1st year of design Roth contrib.

Form 1099-R

9a Your percentage of total distribution	G	9b Total employee contributions	
14 State tax withheld		15 State/Payer's state no.	TX
17 Local tax withheld		18 Name of locality	
		19 Local distribution	

www.irs.gov/Form1099R

Department of the Treasury - Internal Revenue Service

Form 1099-R CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.
MATEIX TRUST COMPANY
WITPRO LIMITED 401(K) PLAN- CTRL A/C
P.O. BOX 52129
PHOENIX, AZ 85072-2129

1 Gross distribution	\$ 33,481.36	OMB No. 1545-0119
2a Taxable amount	\$ 0.00	2023 Form 1099-R
2b Taxable amount not determined		

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance, Contracts, etc.

PAYERS TIN RECIPIENTS TIN

75-3182674 XXX-XX-5935

RECIPIENT'S name, street address (incl. apt. no.), city or town, state or province, country, and ZIP or foreign postal code
SAHANA BASAPPA
11629 SINGLE LEAF DRIVE
FRISCO, TX 75035

Account number (see instructions) 11 1st year of design Roth contrib.

Form 1099-R

3 Capital gain (included in box 2a)	\$	4 Federal income tax withheld	\$	5 Employee contributions / Designated Roth contributions or insurance premiums	\$
6 Net unrealized appreciation in employer's securities	G	7 Distribution code(s)	G	8 Other	
9a Your percentage of total distribution	%	9b Total employee contributions	\$		
14 State tax withheld	\$	15 State/Payer's state no.	TX	16 State distribution	\$
17 Local tax withheld	\$	18 Name of locality		19 Local distribution	\$

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Optum Financial®

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 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 "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 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		PARTICIPANT'S social security number *****9935		OMB No. 1545-1518 2023 Form 5498-SA		HSA, Archer MSA, or Medicare Advantage MSA Information
TRUSTEE'S federal identification number 470858534		1 Employee or self-employed person's Archer MSA contributions made in 2023 and 2024 for 2023 \$ 0		2 Total contributions made in 2023 \$ 5,506.68		
PARTICIPANT'S name SAHANA BASAPPA		3 Total HSA or Archer MSA contributions made in 2024 for 2023 \$472.96		4 Rollover contributions \$ 0.00		5 Fair market value of HSA, Archer MSA, or MA MSA \$ 10,906.58
Street address (including apt. no.) 11629 SINGLE LEAF DR		6 HSA Archer MSA <input checked="" type="checkbox"/>		MA MSA <input type="checkbox"/>		
City or town, state or province, country, and ZIP or foreign postal code FRISCO TX 75035-1768		Account number (see instructions) 420384774		For Participant		This information is being furnished to the Internal Revenue Service.
Form 5498-SA		(keep for your records)		Department of the Treasury - Internal Revenue Service		



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SAHANANA BASAPPA
11629 SINGLE LEAF DR
FRISCO TX 75035-1768

Important IRS Tax Form 1099-SA

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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		OMB No. 1545-1517		Distributions From an HSA, Archer MSA, or Medicare Advantage MSA
Optum Bank P.O. Box 271629 Salt Lake City UT 84127-1629		2023		
PAVER'S/federal identification number 470856534	RECIPIENT'S identification number *****5935	1 Gross distribution \$ 256.22	2 Earnings on excess cont. \$ 0	Copy B For Recipient
RECIPIENT'S name SAHANANA BASAPPA		3 Distribution code 1	4 FMV on date of death \$ 0	
Street address (including apt. no.) 11629 SINGLE LEAF DR		5 HSA Archer MSA <input checked="" type="checkbox"/> MSA <input type="checkbox"/> MA <input type="checkbox"/> MSA <input type="checkbox"/>		This information is being furnished to the Internal Revenue Service.
City or town, state or province, country, and ZIP or foreign postal code FRISCO TX 75035-1768				
Account number (see instructions) 420384774				
Form 1099-SA		(keep for your records)		www.irs.gov/form1099sa
		Department of the Treasury - Internal Revenue Service		

