



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

0190FSTXR0025003-22727-01
 Jayanth Vanaparathi
 6825 TURNSTONE LOOP
 SUNBURY OH 43074-3524

Important IRS Tax Form 1099-SA

Dear Jayanth:

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.
- 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 optumbank.com to access your HSA or call 1-866-234-8913.

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		OMB No. 1545-1517 2023 Form 1099-SA		Distributions From an HSA, Archer MSA, or Medicare Advantage MSA
PAYER'S federal identification number 470858534	RECIPIENT'S identification number *****2707	1 Gross distribution \$ 1,570.66	2 Earnings on excess cont. \$ 0	
RECIPIENT'S name Jayanth Vanaparathi Street address (including apt. no.) 7203 WINDSWEPT WAY City or town, state or province, country, and ZIP or foreign postal code COLUMBUS OH 43235-5749		3 Distribution code 1	4 FMV on date of death \$ 0	
Account number (see instructions) 419412756		5 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA MSA <input type="checkbox"/>		

Form 1099-SA

(keep for your records)

www.irs.gov/form1099sa

Department of the Treasury - Internal Revenue Service