

Optum Financial®

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

Jayanth Vanaparathi
6825 TURNSTONE LOOP
SUNBURY OH 43074-3524

Important IRS Tax Form 5498-SA

Dear Jayanth:

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](https://www.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 "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 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		1 Employee or self-employed person's Archer MSA contributions made in 2023 and 2024 for 2023 \$ 0	OMB No. 1545-1518 2023 Form 5498-SA	HSA, Archer MSA, or Medicare Advantage MSA Information
TRUSTEE'S federal identification number 470858534		2 Total contributions made in 2023 \$ 4,884.20	3 Total HSA or Archer MSA contributions made in 2024 for 2023 \$ 0.00	
PARTICIPANT'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		4 Rollover contributions \$ 0.00	5 Fair market value of HSA, Archer MSA, or MA MSA \$ 9,899.48	Copy B For Participant This information is being furnished to the Internal Revenue Service.
PARTICIPANT'S social security number *****2707		6 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA <input type="checkbox"/> MSA <input type="checkbox"/>		
Account number (see instructions) 419412756				

Form 5498-SA

(keep for your records)

www.irs.gov/form5498sa

Department of the Treasury - Internal Revenue Service