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Optum Financial®

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

NEERAJA DODDA
3660 CANOPY CHASE
CUMMING GA 30041-3618

Important IRS Tax Form 5498-SA

Dear NEERAJA:

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 "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 2 Total contributions made in 2023 $ 7,740.00	OMB No. 1545-1518 2023 Form **5498-SA**	**HSA, Archer MSA, or Medicare Advantage MSA Information**
TRUSTEE'S federal identification number 470858534 / PARTICIPANT'S social security number *****6727	3 Total HSA or Archer MSA contributions made in 2024 for 2023 $0.00		**Copy B**
PARTICIPANT'S name NEERAJA DODDA Street address (including apt. no.) 3660 CANOPY CHASE City or town, state or province, country, and ZIP or foreign postal code CUMMING GA 30041-3618	4 Rollover contributions $ 0.00 6 HSA ■ Archer MSA ☐ MA MSA ☐	5 Fair market value of HSA, Archer MSA, or MA MSA $ 9,593.05	**For Participant** This information is being furnished to the Internal Revenue Service.
Account number (see instructions) 417893718			

Form **5498-SA** (keep for your records) www.irs.gov/form5498sa Department of the Treasury - Internal Revenue Service

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