



Optum Bank
 PO Box 271629
 Salt Lake City, UT 84127

VENKATESWARA R REDDY
 3041 TWIN LAKES DR
 MATTHEWS, NC 28104-6114

Important: IRS tax form 1099-SA for your health savings account (HSA)

Dear VENKATESWARA:

This enclosed IRS tax form 1099-SA shows your 2018 distributions from your Optum Bank health savings account (HSA). Please use this information to fill out IRS tax form 8889 which is what you'll need to submit your taxes. To download the IRS tax form 8889 log in at irs.gov access your HSA then navigate to navigate to Forms and Publications.

Here's what you need to know:

- Box 1 includes your total distributions for 2018.
- 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 2018. 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 1/1/2019 are reflected on this form. However, any corrections processed in 2019 will cause a corrected tax document to be generated.
- If you had any contributions that apply to 2018, you'll also get tax form 5498-SA.

Ready to say goodbye to printed forms? Log in to your account to access your HSA. click "Accounts" from menu bar, select "Account Management" and update your Communications preference to "Online."

Questions? Please log in at www.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 PO Box 271629 Salt Lake City, UT 84127		OMB No. 1545-1517 2018 Form 1099-SA		Distributions From an HSA, Archer MSA, or Medicare Advantage MSA Copy B For Recipient This information is being furnished to the Internal Revenue Service.
PAYER'S federal identification number 47-0858534	RECIPIENT'S identification number XXX-XXX-9369	1 Gross distribution \$3,326.96	2 Earnings on excess cont. \$0.00	
RECIPIENT'S name VENKATESWARA R REDDY Street address (including apt. no.) 3041 TWIN LAKES DR City or town, state or province, country, and ZIP or foreign postal code MATTHEWS, NC 28104-6114		3 Distribution code 1	4 FMV on date of death \$	
Account number (see instructions) 502197700		5 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA <input type="checkbox"/> MSA <input type="checkbox"/>		
Form 1099-SA (keep for your records) © 2019 Optum Bank, Member FDIC. All rights reserved. 67440-082017		www.irs.gov/form1099sa Department of the Treasury - Internal Revenue Service		