

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

Dear abhaypratap:

This enclosed IRS tax form 1099-SA shows your 2017 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 2017.
- 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 2017. 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 1/1/2018 are reflected on this form. However, any corrections processed in 2018 will cause a corrected tax document to be generated.
- If you had any contributions that apply to 2017, 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 Post Office Box 271129 Salt Lake City, UT 84127-1129		OMB No. 1545-1517 <h1 style="text-align: center;">2017</h1> 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-3794	1 Gross distribution \$2,927.25	2 Earnings on excess cont. \$0.00	
RECIPIENT'S name abhaypratap singh Street address (including apt. no.) 465 BUCKLAND HILLS DR APT 25212 City or town, state or province, country, and ZIP or foreign postal code MANCHESTER, CT 06042-9131		3 Distribution code 1	4 FMV on date of death \$	
Account number (see instructions) 407733444		5 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA <input type="checkbox"/> MSA		