OPTUM Bank®
Member FDIC

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 5498-SA for your health savings account (HSA)

Dear VENKATESWARA:

The enclosed IRS tax form 5498-SA shows your 2018 contributions to 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 access IRS tax form 8889 log in at irs.gov and navigate to Forms and Publications.

Here's what you need to know:

- Box 2 shows your total contributions made for 2018 including those made in 2018 for 2017, if applicable.
- You have until the tax filing deadline of this year to submit contributions for 2018. If you make any contributions in 2019 before the tax deadline for 2018 you will receive an updated 5498-SA in May.
- To get your total contributions for 2018 add Box 2 plus Box 3. Please note you if you made any contributions in 2018 for 2017 you need to review your updated 5498 for 2017 and subtract that Box 3.
- The Fair Market Value consists of your HSA cash balance and any investment balance as of 12/31/2018
- If you had a reportable distribution for 2018, you'll also get tax form 1099-SA. If you did not use (no distributions) your HSA in 2018 you will not get a 1099-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		1 Employee or self-employed person's Archer MSA contributions made in 2018 and 2019 for 2018 $	OMB No. 1545-1518 **2018** Form **5498-SA**	**HSA, Archer MSA, or Medicare Advantage MSA Information**
Optum Bank PO Box 271629 Salt Lake City, UT 84127		2 Total contributions made in 2018 $6,900.00		
TRUSTEE'S federal identification number 47-0858534	PARTICIPANT'S social security number XXX-XXX-9369	3 Total HSA or Archer MSA contributions made in 2019 for 2018 $0.00		**Copy B For Participant** This information is being furnished to the Internal Revenue Service.
PARTICIPANT'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		4 Rollover contributions $0.00	5 Fair market value of HSA, Archer MSA, or MA MSA $9,773.02	
		6 HSA ■ Archer MSA MA ☐ MSA ☐		
Account number (see instructions) 502197700				

Form **5498-SA** (keep for your records) www.irs.gov/form5498SA Department of the Treasury - Internal Revenue Service

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