



P.O. Box 271629
Salt Lake City UT 84127-1129



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AWAIS SULTAN
1157 W VERNON PARK PL
CHICAGO, IL 60607-3423



Important: IRS tax form 5498-SA for your health savings account(HSA)

Dear AWAIS:

The enclosed IRS tax form 5498-SA shows your 2018 contributions to your OptumBank 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 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 myuhc.com to access your HSA or call 1-800-791-9361.

☐ CORRECTED (if checked)

TRUSTEE'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number OptumBank P.O. Box 271629 Salt Lake City UT 84127-1129		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 Copy B For Participant This information is being furnished to the Internal Revenue Service.
		2 Total contributions made in 2018 \$ 6899.88		
TRUSTEE'S federal identification number 47-0858534	PARTICIPANT'S social security number XXX-XX-6504	3 Total HSA or Archer MSA contributions made in 2019 for 2018 \$		
PARTICIPANT'S name AWAIS SULTAN Street address (including apt. no.) 1157 W VERNON PARK PL City or town, state or province, country, and ZIP or foreign postal code CHICAGO IL 60607-3423		4 Rollover contributions \$	5 Fair market value of HSA, Archer MSA, or MA MSA \$ 4526.09	
Account number (see instructions) 303491250		6 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA <input type="checkbox"/> MSA <input type="checkbox"/>		

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



P.O. Box 271629
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Important: IRS tax form 1099-SA for your health savings account (HSA)

Dear AWAIS:

This enclosed IRS tax form 1099-SA shows your 2018 distributions from your OptumBank 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 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 shortly.
- 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 myuhc.com to access your HSA or call 1-800-791-9361.

☐ 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 OptumBank P.O. Box 271629 Salt Lake City UT 84127-1129		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-XX-6504	1 Gross distribution \$ 3371.51	2 Earnings on excess cont. \$	
RECIPIENT'S name AWAIS SULTAN Street address (including apt. no.) 1157 W VERNON PARK PL City or town, state or province, country, and ZIP or foreign postal code CHICAGO IL 60607-3423		3 Distribution code 1	4 FMV on date of death \$	
5 HSA <input checked="" type="checkbox"/> Archer MSA <input type="checkbox"/> MA MSA <input type="checkbox"/>				
Account number (see instructions) 303491250				

Form **1099-SA**

(keep for your records)

www.irs.gov/form1099sa

Department of the Treasury - Internal Revenue Service