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|---|---|-------------------------------|----------------------|
| TRUSTEE'S or ISSUER'S name, street address, city or town, state or province, country, and ZIP or foreign postal code Financial Intelligence Associates 12022 Sundown Valley Dr Reston, VA 20191 | | 1 Coverdell ESA contributions | OMB No. 1545-1815 |
| | | \$ 1000.00 | 2023 |
| | | 2 Rollover contributions | |
| | | \$ 2000.00 | Form 5498-ESA |
| TRUSTEE'S/ISSUER'S TIN 12-3456789 | BENEFICIARY'S TIN XXX-XX-1234 | | |
| BENEFICIARY'S name Kris Q. Public Street address (including apt. no.) 1 Main St City or town, state or province, country, and ZIP or foreign postal code Melrose, NY 12121 Account number (see instructions) 123-1234567 | | | |
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**Coverdell ESA
Contribution
Information**

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For Beneficiary

This information
is being furnished
to the IRS.

Form **5498-ESA**

(keep for your records)

www.irs.gov/Form5498ESA

Department of the Treasury - Internal Revenue Service

QR CODE WITH TAX DOCUMENT DATA

The Financial Data Exchange standards-setting organization defines the use of QR codes for US Tax data.

For more information about how this code can be used visit:

<https://financialdataexchange.org/us-tax>

