

☐ CORRECTED (if checked)

|   |   |   |   |  |
|---|---|---|---|--|
| TRUSTEE'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number<br><b>Financial Intelligence Associates</b><br><b>12022 Sundown Valley Dr</b><br><b>Reston, VA 20191</b> |   | 1 Employee or self-employed person's Archer MSA contributions made in 2023 and 2024 for 2023<br>\$                  | OMB No. 1545-1518<br><b>2023</b><br>Form <b>5498-SA</b>                 | <b>HSA, Archer MSA, or Medicare Advantage MSA Information</b>                                      |
|   |   | 2 Total contributions made in 2023<br>\$ <b>3000.00</b>   |   |  |
| TRUSTEE'S TIN<br><b>12-3456789</b>  | PARTICIPANT'S TIN<br><b>XXX-XX-1234</b> | 3 Total HSA or Archer MSA contributions made in 2024 for 2023<br>\$ <b>300.00</b>                                   |   | <b>Copy B</b><br><br><b>For Participant</b><br><br>This information is being furnished to the IRS. |
| PARTICIPANT'S name<br><b>Kris Q. Public</b><br><br>Street address (including apt. no.)<br><b>1 Main St</b><br><br>City or town, state or province, country, and ZIP or foreign postal code<br><b>Melrose, NY 12121</b>              |   | 4 Rollover contributions<br>\$ <b>200.00</b>  | 5 Fair market value of HSA, Archer MSA, or MA MSA<br>\$ <b>10000.00</b> |  |
| Account number (see instructions)<br><b>123-1234567</b>   |   | 6 HSA <input checked="" type="checkbox"/><br>Archer MSA <input type="checkbox"/><br>MA MSA <input type="checkbox"/> |   |  |
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Form **5498-SA** (keep for your records) [www.irs.gov/Form5498SA](http://www.irs.gov/Form5498SA) Department of the Treasury - Internal Revenue Service

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Reston, VA 20191

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Melrose, NY 12121

**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>

