



National Financial Services LLC
Agent for Fidelity Personal Trust Company.
P.O. Box 28019
Albuquerque, NM 87125-8019

2020 Form 5498-SA Health Savings Account

Account No.	Participant TIN	Page
226-079662	***-**-0343	1 of 2

eDelivered

STEVEN D RATTS
174 MARTESIA WAY
INDN HBR BCH FL 32937-3573

TRUSTEE'S TIN: 04-3523567

Customer Service: 800-544-3716
Visit Us Online: [Fidelity.com](https://www.fidelity.com)

Form 5498-SA

2020 HSA Information

OMB No. 1545-1518
Copy B for Participant

The information in lines 2 through 6 is being furnished to the Internal Revenue Service.

2	Total HSA Contributions made in 2020.....	7,599.93
3	Total HSA Contributions made in 2021 for 2020.....	0.00
4	Rollover Contributions	0.00
5	Fair Market Value of HSA	14,588.54
6	Account Type	HSA

Supplemental Account Information

The information below is not reported to the Internal Revenue Service.

HSA Portfolio as of December 31, 2020

Security	CUSIP	Quantity	Price	Market Value
226-079662				
FDIC INSURED DEPOSIT AT WELLS FARGO HSA	FDIC99318	13,232.8400	1.000	13,232.84
FDIC INSURED DEPOSIT AT CITIBANK HSA NOT	FDIC99359	1,355.7000	1.000	1,355.70

Fair Market Value of Your HSA Portfolio as of 12/31/2020	14,588.54
Fair Market Value of Your HSA Portfolio as of 12/31/2019	13,803.63

HSA Beneficiary Summary Statement as of April 30, 2021

Account	Primary or Contingent	Name	Share Percent	Date of Birth/Trust	Relationship	Legal Heir Option
226-079662						
	Primary	CATHERINE ELIZABETH KIMBALL-LINARES	100.00	08/25/1973	Spouse	Per Stirpes
	Contingent	No Contingent Beneficiary available.				

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Form 5498-SA: HSA information

These are IRS instructions that we are required to provide to you.

Instructions for Participant

This information is submitted to the Internal Revenue Service by the trustee of your health savings account (HSA).

Generally, contributions you or someone other than your employer make to your HSA are deductible on your tax return. Employer contributions to your HSA may be excluded from your income and are not deductible by you. You and your employer can make contributions to your HSA in the same year.

See Form 8889, Health Savings Accounts (HSAs) and its instructions. Any employer contributions made to HSAs are shown on your Form W-2 in Box 12 (code W).

For more information, see Pub. 969, Health Savings Accounts and Other Tax-Favored Health Plans.

Participant's identification number (TIN). For your protection, this form may show only the last four digits of your social security number (SSN), individual tax identification number (ITIN), or adoption tax identification number (ATIN), or employer identification number (EIN). However, the issuer has reported your complete identification number to the IRS.

Account number. May show an account or other unique number the trustee assigned to distinguish your account.

Note. The information in lines 2 and 3 is provided for IRS use only.

Line 1. Does not apply to this account.

Line 2. Shows the total contributions made in 2020 to your HSA. This includes qualified HSA funding distributions (trustee-to-trustee transfers) from your IRA to fund your HSA. See Pub. 969 for who can make contributions.

Line 3. Shows the total HSA contributions made in 2021 for 2020.

Line 4. Shows any rollover contribution from an HSA or Archer MSA to this HSA. See Form 8853 (Archer MSA) or Form 8889 (Health Savings Accounts) and their instructions for information about how to report distributions. This amount is not included in line 1, 2, or 3.

Line 5. Shows the fair market value of your HSA at the end of 2020.

Line 6. Shows the type of account that is reported on this Form 5498-SA.

Other information. The trustee of your HSA may provide other information about your account on this form.

Note. Do not attach Form 5498-SA to your income tax return. Instead, keep it for your records.

Future developments. For the latest information about developments related to Form 5498-SA and its instructions, such as legislation enacted after they were published, go to www.irs.gov/form5498sa.