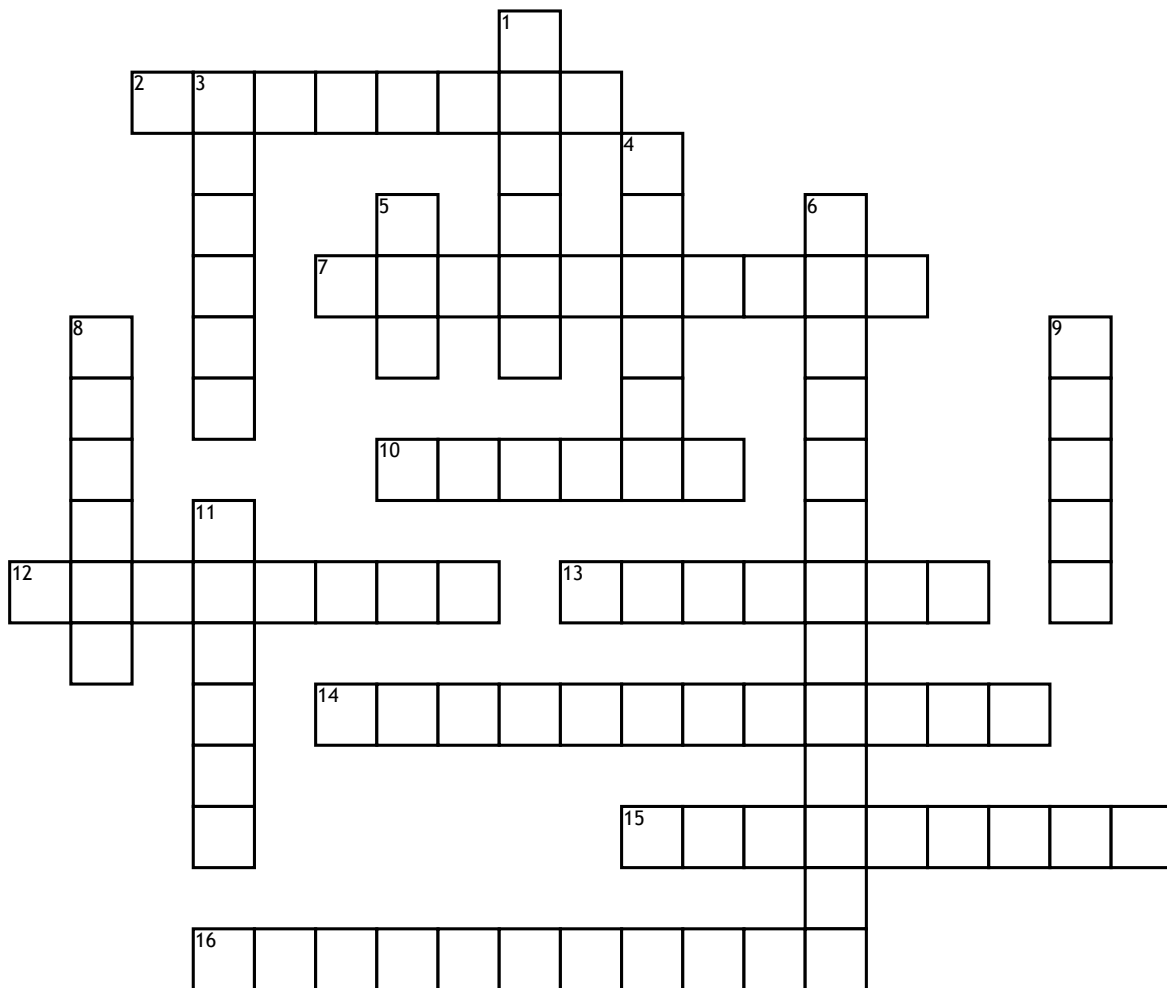


Tax Information Crossword



Across

2. The 5498-sa list the fair market value which is the balance on the account as of _____ 31st.

7. Customers will not receive a corrected 5498 after an excess contribution correction has been made. The _____ will show up on the 1099 for the calendar year that the correction was made.

10. The IRS only allows HSA funds to be _____ into another HSA

12. Moving funds from one trustee to another trustee is called a _____

13. Excess contributions can only be processed up to _____ 15th of the following tax year.

14. MMF (Monthly Maintenance Fee) does not count as a _____ from the HSA

15. The IRS allows 60 days from the date of transfer for the funds to be _____ into the new HSA

16. 1099-SA reports any _____ a consumer makes from their HSA account

Down

1. Expenses incurred _____ you establish your HSA are not qualified medical expenses

3. An _____ contribution is where an account holder sent in more than the maximum contribution for a tax year

4. When sending documents via email, you MUST send the email as a _____ email

5. If no withdrawals or distributions were made from the account, the customer will _____ receive a 1099-SA for that tax year

6. A 5498-SA is primarily used to report _____ into an HSA

8. IRS for 8889 is a form that is used to _____ the contributions and distributions for the HSA account.

9. If the account holder would like an IRA rollover form mailed to them you will send an _____warriorsteamadmin@optum.com

11. Account holders can view their tax documents _____