

# HSA Tax Check List

Let us help you get organized this tax season

## 2017 Tax Forms Required for HSAs

### HSA Tax Form Check List

#### From Your HSA Provider

- IRS Form 1099-SA** This form is only required if you distributed funds that year from your HSA, including rollover funds. This is typically sent out by January 31 each year.
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- IRS Form 5498-SA** This form is only required if you contributed funds to your HSA in the previous year until April 15 of the current year, including rollover funds. This is typically sent out by May 31 each year.
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#### Additional Required Federal Tax Forms

- IRS Form 1040** This is the standard federal income tax form from which you can get HSA contributions, taxable non-medical HSA distributions, excess HSA contributions not withdrawn or non-medical HSA distributions that you will need to report.
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- IRS Form 8889** This form is required if any HSA contributions have been made to your HSA (from yourself or another person), you have made any HSA distributions, or received an HSA upon the death of the owner.
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- IRS Form 5329** This form only applies if you have excess HSA contributions, prior to the current year tax deadline.

Nothing on this page is intended to provide any tax, legal, insurance or financial advice. Please consult with a professional in those areas for specific advice related to your situation. Additional forms may be required for federal or state tax purposes. For more information on HSAs and tax or reporting requirements, please refer to IRS Publication 969.