

# YOUR QUICK GUIDE TO HSA TAX FORMS



## FORM 1099-SA



This form records all distributions from (a.k.a. money withdrawn from) an HSA during the tax year.

## FORM 5498-SA



This form records all contributions to (a.k.a. money added to) an HSA during the tax year. This is an informational form that is generated in May and is not needed to file taxes.

## FORM 8889



This is the form individuals will use to report any withdrawals or contributions (both self-contributed or employer-contributed) made during the tax year. This should get attached to the completed Form 1040.

## FORM 1040



This is the form individuals will use to file an income tax return. Form 8889 should be attached to this form to record HSA deductions (line item 25 in the "Adjusted Gross Income" section).

APRIL 15



This is the deadline for filing taxes!