

Tax Statement for Forms 1098, 1099 and 5498 for Year 2015

NAME, ADDRESS AND FEDERAL I.D. NO.

CUSTOMER NAME ADDRESS

THE BANCORP BANK
409 SILVERSIDE ROAD, SUITE 105
WILMINGTON, DE 19809

JOE SMITH
123 ANY STREET
NEW YORK, NY 00000

Payer's Federal ID# 00-0000000
 Questions? (800) 545-0289

Account Type

Form Name

150D00702767-01

FORM 1 OF 1

2015 FORM 5498-SA: HSA, ARCHER MSA, OR MEDICARE ADVANTAGE MSA INFORMATION

Account Number	IRS Description	IRS Box#	Amount
000000XXXXXXXXXX01	Total contributions made in 2015	2	1,271.20
	Total HSA or Archer MSA contributions made in 2016 for 2015	3	35.00
	Fair market value of HSA, Archer HSA MSA, or MA MSA	5	184.93
	HSA	6	X

10-digit
Account Number

TOTALS: Employee or self-employed person's Archer MSA contributions made in 2015 and 2016 for 2015
Total contributions made in 2015
Total HSA or Archer MSA contributions made in 2016 for 2015
Rollover contributions
Fair market value of HSA, Archer MSA, or MA MSA

1	0.00
2	1,271.20
3	35.00
4	0.00
5	184.93

TAXPAYER I.D. NO.

000-00-0000

(keep for your records)

DEPARTMENT OF THE TREASURY - INTERNAL REVENUE SERVICE

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- **Box 1.** Shows contributions you made to your Archer MSA for 2015. You may be able to deduct this amount on your 2015 Form 1040. See Form 1040 instructions.
Note: This includes contributions made between 01/01/2015 and 12/31/2015 that were designated as 2015 contributions, and contributions made between 01/01/2016 and 04/18/2016 that were designated as 2015 contributions.
- **Box 2.** Shows the total contributions made in 2015 to your HSA or Archer MSA. See Pub. 969 for who can make contributions. This includes qualified HSA funding distributions (trustee-to-trustee transfers) from your IRA to fund your HSA. The trustee of your MA MSA is not required to, but may, show contributions to your MA MSA.
Note: This includes contributions made between 01/01/2015 and 12/31/2015 that were designated as 2015 contributions, and contributions made between 01/01/2016 and 04/18/2015 that were designated as 2014 contributions.
- **Box 3.** Shows the total HSA or Archer MSA contributions made in 2016 that were designated for 2015.
- **Box 4.** Shows any rollover contribution from an Archer MSA to this Archer MSA in 2015, or any rollover from an HSA, IRA or Archer MSA to this HSA. Also included are qualified HSA distributions (direct transfers) from a health Flexible Spending Arrangement (FSA) or Health Reimbursement Arrangement (HRA) to fund an HSA. See Form 8853 or Form 8889 and their instructions for information about how to report distributions and rollovers. This amount is not included in Box 1, 2, or 3.
- **Box 5.** Shows the fair market value of your HSA, Archer MSA, or MA MSA at the end of 2015.
- **Box 6.** Shows the type of account reported on this Form 5498-SA.

Notes:

- The trustee of your HSA, Archer MSA, or MA MSA may provide other information about your account on this form.
- You can continue making 2015 HSA contributions through 04/18/2016, provided you have not met or exceeded your annual contribution limit for 2015 (including catch-up contributions, if applicable).
- Form 5498-SA will be mailed to you after 04/18/2016, to allow you time to apply additional contributions to your HSA for 2015. It will be mailed by 05/31/2016.
- Do not attach Form 5498-SA to your income tax return. Instead, keep it for your records.