



HSA Tax Prep

CHECKLIST



Check your W-2 for HSA payroll contributions



Download your 1099-SA Form

(If you spent funds from your HSA)

- To download visit: u.bpas.com & select Tax Forms from the Library.



Report contributions & distributions via Form 8889



Carry information from completed Form 8889 to Form 1040



Download your 5498-SA Form

- For informational purposes only.
- Available May 31, if you added funds to your HSA in the prior calendar year.
- To download visit: u.bpas.com & select Tax Forms from the Library.