

Health Savings Account Tax Documents & Statements



You will receive your annual HSA tax documents electronically.

All Chard Snyder HSA account holders are automatically set up to receive annual tax documents electronically. This means that your tax documents will be made available on your Chard Snyder online account once they are ready. If you have an email address in our system, we will send you an email notification to let you know when the tax documents are available.

If you would like your HSA tax documents mailed, you must choose the *Paper* option in your online *Notification Preferences* by December 31. There is no fee to have your tax documents mailed to your address on file. If you change your mind, you may turn this option off at any time.

Your HSA tax documents are always available on your Chard Snyder online account under the *Accounts* tab, *Statements* section. They are formatted to be easily saved to your computer or printed if necessary.

Which tax documents should you expect to receive?

Form 1099-SA for distributions and Form 5498-SA for contributions

Form **1099-SA** is used to report distributions (money paid out) from your HSA during the tax year. Form 1099-SA will be created and posted in your online account in January for the previous tax year, and mailed (if requested) no later than January 31. If no distributions occurred, Form 1099-SA will not be created.

Form **5498-SA** is used to report contributions (money deposited) to your HSA during the tax year. Form 5498-SA will be created and posted in your online account in January for the previous tax year, and mailed (if requested) no later than the end of February.

If you make an additional contribution to your HSA after December 31 and before the tax-filing deadline (April 15), a corrected 5498-SA will be created and made available in the your online account. If you have chosen the paper option, you will receive an updated form in the mail. If there are no contributions for the current tax year, Form 5498-SA will not be created.

A notification will be sent to you when annual tax documents are posted to your online account.

Update Your Contact Information on Your Online Account

To view, add or update your email, mobile number, or home address, log in to your Chard Snyder online account and click on the *Accounts* tab, or click on your name at the top of the page to open the drop-down menu. Click on *Profile Summary* (in either location) and choose *Update Profile* to make changes to your contact information.



The Chard Snyder Mobile App



Manage your
HSA on the
go, anywhere,
anytime

Features

- View account balances and transaction details
- Request HSA transactions, including distributions and contributions
- Manage HSA investments to realign, update, or transfer your portfolio (*Options become available when minimum HSA cash balance set by your employer is reached.*)
- Enter your bank account for seamless transfers
- Scan any product for eligibility using your phone's camera

Download from the App Store or
Google Play

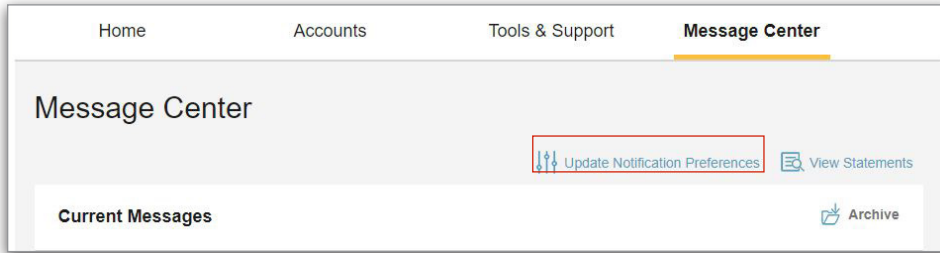


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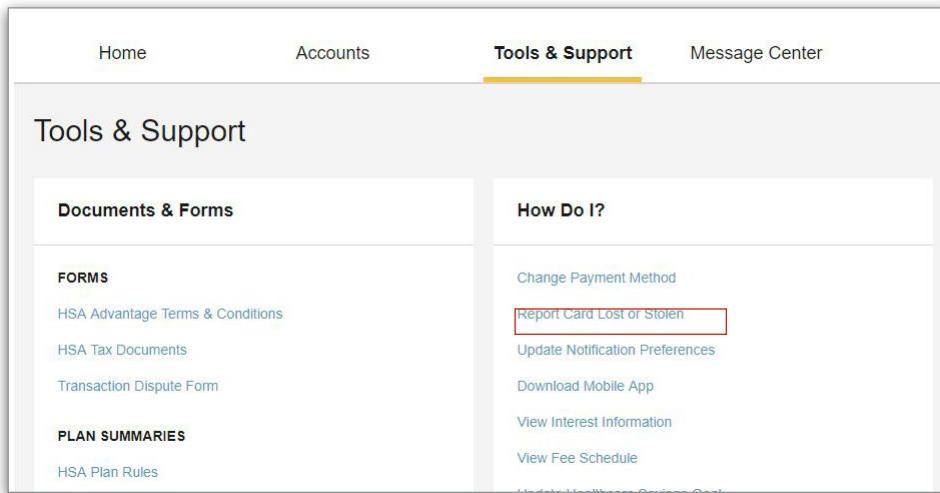
Chard Snyder helps you get the most out of your HSA benefit.

Set Your Delivery and Alert Preference

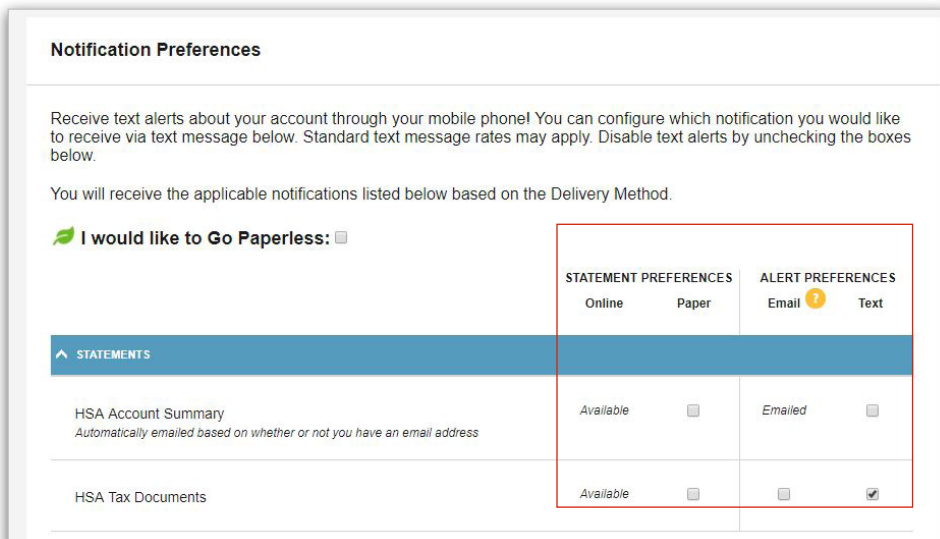
Log in to your Chard Snyder online account and go to the *Message Center* tab. Click on *Update Notification Preferences*



OR go to the *Tools & Support* tab and click on *Update Notification Preferences*



Then choose the *Notification Preference*



Chard Snyder Website

www.chard-snyder.com

Once you've enrolled, access your Chard Snyder HSA online account from the website home page by clicking on the blue *Login* tab at the top right of the page.



Chard Snyder Participant Services

Our Participant Services team is here to help answer questions you may have about your HSA. If you can't find what you are looking for in the mobile app or your online portal, give us a call.



800.982.7715 www.chard-snyder.com