

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 1099-SA: DISTRIBUTIONS FROM AN HSA, ARCHER MSA, OR MEDICARE ADVANTAGE MSA

Account Number	IRS Description	IRS Box#	Amount
000000XXXXXXXXXX01	Gross distribution	1	1,638.68
	Distribution code	3	1
	FMV on date of death	4	0.00
	HSA	5	X

10-digit
Account Number

TOTALS: Gross distribution
Earnings on excess cont.
FMV on date of death

1	1,638.68
2	0.00
4	0.00

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 the amount distributed this year. The amount may have been a direct payment to a medical service provider or distributed to you.
- **Box 2.** Shows the earnings on any excess contributions you withdrew from an HSA or Archer MSA by the due date of your income tax return. If you withdrew the excess, plus any earnings, by the due date of your income tax return, you must include the earnings in your income in the year you received the distribution, even if you used it to pay for qualified medical expenses. This amount is included in Box 1. Include the earnings on the "Other income" line of your tax return. An excise tax of 6% for each tax year is imposed on you for excess individual and employer contributions that remain in the account. See Form 5329, Additional Taxes on Qualified Plans (Including IRAs) and Other Tax-Favored Accounts.
- **Box 3.** These codes identify the distribution you received: 1-Normal distribution; 2-Excess contributions; 3-Disability; 4-Death distribution other than code 6; 5-Prohibited transaction; 6-Death distribution after year of death to a non-spouse beneficiary.
- **Box 4.** If the account holder died, shows the fair market value (FMV) of the account on the date of death.
- **Box 5.** Shows the type of account reported on this Form 1099-SA.

Note: Do not attach Form 1099-SA to your income tax return. Instead, file Form 8853 or Form 8889 with your Form 1040 to report a distribution from these accounts, even if the distribution is not taxable. The payer is not required to compute the taxable amount of any distribution.