

2009 Tax Organizer

Health Savings Account (HSA) Questions

Complete a separate form for each HSA Plan.

High Deductible Health Plan Information			
Indicate type of coverage under a High Deductible Health Plan		Self Only	Family Coverage (see Note)
Note: Family HDHP coverage is an HDHP covering an eligible individual and at least one other individual (whether or not that individual is an eligible individual).			
Number of Months in High Deductible Health Plan in 2009		Minimum Annual Deductible for the High Deductible Plan	\$
		Maximum Annual Deductible and other out-of-pocket expenses for the High Deductible Plan	\$
Contributions Information			
Taxpayer HSA contributions for 2009 (Pre-Tax/Cafeteria plan)			\$
Taxpayer HSA contributions for 2009 (Non-Pre-Tax/Non-Cafeteria plan)			\$
Rollover contributions to HSA for 2009			\$
Employer HSA contributions for 2009 (Box 12 code W on W-2)			\$
Distributions Information			
Total HSA Distributions for 2009 (bring forms 1099-SA)			\$
Were the Gross Distributions used only to pay Qualified Medical Expenses? <input type="checkbox"/> Yes <input type="checkbox"/> No.			
HSA Account Balance			
HSA Balance on December 31, 2009			\$