

MyChoice Accounts

Member Statement Samples





Statement Menu

HSA Members

Home > Benefits Information > I Want To... >

Dashboard Accounts Investments Claims Manage Statements

Account Statements
Tax Statements
Investment Statement
Investment Trade Confirmation
Statement Preferences

Dashboard

What do you want to do today?

Process for submitting claims

1. Submit Documentation 2. Claim Processed 3. Claim Paid

Documents should include:

1. Date the expense was incurred
2. Name of the service provider
3. Description of the service and/or expense
4. Amount of the expense for which you are responsible
5. Patient or Dependent name (if applicable)

Cancelled checks, credit card

Processing request statuses:

- Approved
- Approved Awaiting Funds
- Needs Documentation
- Partially Approved

Your claim has been paid

Account Balances

2024 - LFSA LFSA	\$0.00
2023 - LFSA LFSA	\$0.00
Health Savings Account HSA	\$879.96



Account Statements

HSA Members

Home > Benefits Information > I Want To... >

Dashboard Accounts Investments Claims Manage **Statements**

Account Statements

- Tax Statements
- Investment Statement
- Investment Trade Confirmation
- Statement Preferences

Statement Date	Actions
09/30/2024	Download
06/30/2024	Download
03/31/2024	Download
12/31/2023	Download
09/30/2023	Download
06/30/2023	Download
03/31/2023	Download
12/31/2022	Download

Showing 8 of 8

Only the most recent 8 quarterly statements are available to download online. If you need access to an older statement, we'll send a copy to you! Please reach out to us at 866-520-4472.



Account Statements

Available quarterly

Downloadable PDF



Account Information

Account Registration
 JOHN F. DOE
 123 Main St
 ANYTOWN SC 02020-3331

Fair Market Value as of September 30, 2024



Your Allocation	
Deposit Account ¹	\$827.00
Investment Account(s) ³	\$32,622.35
Fair Market Value	\$33,449.35

For Your Information

¹ Funds in this account are insured by the FDIC to the maximum permitted by law

³ NOT FDIC INSURED / NO BANK GUARANTEE / MAY LOSE VALUE
 Securities in your self-directed HSA investment account are offered through the investment provider(s) indicated in the terms and conditions applicable to your HSA Investment Account. You may obtain a copy of your HSA investment account terms and conditions by accessing your account online or by contacting Customer Service. The Investment Account balance and Fair Market Value reflected above are the balances at the time this statement was created and may vary from your current HSA investment balance. Self-directed HSA investment account activity is not included in this statement. Your HSA investment account statement will be delivered separately. See your HSA investment statement account or access your HSA investment account online to view the most current balance and activity.

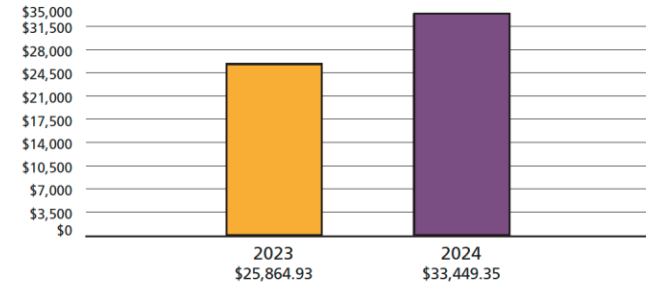
Your Healthcare Account Statement

July 1, 2024 through September 30, 2024
 Account Number 123456789

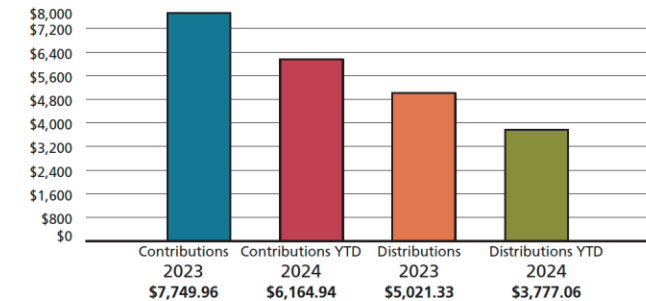
Contact Information:

866-520-4472

Fair Market Value



Contributions & Distributions



»»» Tax Statements

Available annually

- 1099 posts in January
- 5498 posts in May

The screenshot shows a web application interface for viewing tax statements. At the top, there is a navigation bar with a home icon and the text 'Home > Benefits Information > I Want To...'. Below this is a secondary navigation bar with tabs for 'Dashboard', 'Accounts', 'Investments', 'Claims', 'Manage', and 'Statements'. The 'Statements' tab is currently selected. On the left side, there is a sidebar menu with the following items: 'Account Statements', 'Tax Statements' (highlighted with an orange border), 'Investment Statement', 'Investment Trade Confirmation', and 'Statement Preferences'. The main content area displays a table of tax statements with the following columns: 'Statement Year' and 'Actions'. The table contains 8 rows of data, each representing a tax statement for a specific year and type (1099-SA or 5498-SA). Each row has a download icon in the 'Actions' column. Below the table, it says 'Showing 8 of 8'. At the bottom, there is a note: 'Only the most recent 5 years of tax statements are available to download online. If you need access to an older statement, we'll send a copy to you! Please reach out to us at 866-520-4472.'

Statement Year	Actions
2020 1099-SA	Download
2020 5498-SA	Download
2021 1099-SA	Download
2021 5498-SA	Download
2022 1099-SA	Download
2022 5498-SA	Download
2023 1099-SA	Download
2023 5498-SA	Download

Showing 8 of 8

Only the most recent 5 years of tax statements are available to download online. If you need access to an older statement, we'll send a copy to you! Please reach out to us at 866-520-4472.



Investment Statements

Available monthly

Home > Benefits Information > I Want To... >

Dashboard Accounts Investments Claims Manage Statements

- Account Statements
- Tax Statements
- Investment Statement**
- Investment Trade Confirmation
- Statement Preferences

Date	Actions
02/29/2024	Download
03/31/2024	Download
04/30/2024	Download
05/31/2024	Download
06/30/2024	Download
07/31/2024	Download
08/31/2024	Download
09/30/2024	Download
10/31/2024	Download

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Investment Statements

Sample

mychoice Accounts **Account Statement**
October 01, 2024 - October 31, 2024

Businessolver Inc
1025 Ashworth Rd, West Des Moines, IA 50265
Des Moines IA 50265

Account Number: BSVR - 001 - BVPF00092384 Account Name: John F. Doe

Valuation Summary	This Period	This Year
Beginning Account Value	\$32,815.99	0.00
Deposits	\$270.37	\$30,095.12
Dividend & Interest	\$44.49	\$425.21
Withdrawals	(\$151.63)	(\$27,421.86)
Other Activity	(\$270.37)	(\$3,098.47)
Net Change in Portfolio Value	(\$274.27)	\$32,434.58
Ending Account Value	\$32,434.58	\$32,434.58

Asset Allocation Summary	Value Last Period	Value This Period
Cash & Cash Equivalents	\$107.14	\$0.00
Equities	\$32,708.85	\$32,434.58
Options	\$0.00	\$0.00
Fixed Income	\$0.00	\$0.00
Mutual Funds	\$0.00	\$0.00
Other Assets	\$0.00	\$0.00

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Investment Trade Confirmation

Available for each transaction

This member has auto-sweep set up and has trades each paycheck


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Date	Actions
02/14/2024	Download
02/26/2024	Download
02/29/2024	Download
03/01/2024	Download
03/06/2024	Download
03/08/2024	Download
03/11/2024	Download
03/25/2024	Download
03/27/2024	Download
04/08/2024	Download
04/18/2024	Download
04/19/2024	Download
04/22/2024	Download
05/03/2024	Download
05/17/2024	Download



Transaction Confirmation

Sample



Transaction Confirmation

Businessolver Inc
1025 Ashworth Rd, West Des Moines, IA 50265
Des Moines IA 50265

Account Number: BSVR – 001 – BVPF00092384 **Account Name:** John F. Doe

Confirmation Date : 10/7/2024

Symbol	Security	A/CType	Action	Quantity	Price	Trade Date	Settle Date	Capacity
AOR	ISHARES TR GRWT ALLOCAT ETF	M	Buy	1	58.59	10/7/2024	10/8/2024	Agency
								Principal Amount \$58.59
								Interest
								Commission \$0.00
								Transaction Fee \$0.00
								Other Fees / Credits \$0.00
								Net Amount \$58.59
AOR	ISHARES TR GRWT ALLOCAT ETF	M	Buy	0.19542584	58.59	10/7/2024	10/8/2024	Principal
								Principal Amount \$11.45
								Interest
								Commission \$0.00
								Transaction Fee \$0.00
								Other Fees / Credits \$0.00
								Net Amount \$11.45
IVV	ISHARES TR CORE S&P500 ETF	M	Buy	0.12201027	574.05	10/7/2024	10/8/2024	Riskless Principal
								Principal Amount \$70.04
								Interest
								Commission \$0.00
								Transaction Fee \$0.00
								Other Fees / Credits \$0.00
								Net Amount \$70.04
VTV	VANGUARD INDEX FDS VALUE ETF	M	Buy	0.53595408	174.25	10/7/2024	10/8/2024	Riskless Principal
								Principal Amount \$93.39
								Interest
								Commission \$0.00
								Transaction Fee \$0.00
								Other Fees / Credits \$0.00
								Net Amount \$93.39



Statement Preferences

Sample

Home > Benefits Information > I Want To...

Dashboard Accounts Investments Claims Manage Statements

Account Statements

Tax Statements

Investment Statement

Investment Trade Confirmation

Statement Preferences

Account Statement Preference

Do you want to receive electronic statements for HSA accounts?

Yes No

Email *

johndoe@gmail.com

Cancel Submit

