

# MyChoice Accounts

## Member Statement Samples



# Statement Menu

## HSA Members

The screenshot displays the Businessolver HSA Member dashboard. At the top, the Businessolver logo is on the left, and navigation links for Home, Message Center, and Reference Center are on the right, along with a user profile for John Doe. A search bar is located in the top right. Below the navigation bar, a horizontal menu contains links for Dashboard, Accounts, Investments, Claims, Manage, and Statements. The Statements link is highlighted with a blue border and an orange box. A dropdown menu is open under Statements, listing the following options: Account Statements, Tax Statements, Investment Statement, Investment Trade Confirmation, and Statement Preferences. The main content area is divided into three sections. The first section, 'MyChoice Accounts', contains two cards: '2025 - LFSA' with an account balance of \$1,540.78 and a 'View Account' button, and '2024 - LFSA' with an account balance of \$0.00 and a 'View Account' button. The second section, 'Health Savings Account', shows an account balance of \$656.77 and a 'View Account' button. The third section, 'Investment Value', shows a balance of \$23,846.21. On the right side of the dashboard, there is a 'Shortcuts' section with links to 'Submit a Claim', 'Manage Bank Account', 'Manage Cards', 'See Statements', and 'Report a Card Lost or Stolen'. At the bottom right, there is an advertisement for the 'HSA store' featuring various health products and a 'Shop HSA Store' button.

businessolver

Home Message Center Reference Center John Doe

Search

Dashboard Accounts Investments Claims Manage Statements

Account Statements  
Tax Statements  
Investment Statement  
Investment Trade Confirmation  
Statement Preferences

MyChoice Accounts

2025 - LFSA  
Account Balance as of 5/28/2025  
**\$1,540.78** View Account

2024 - LFSA  
Account Balance as of 5/28/2025  
**\$0.00** View Account

Health Savings Account  
Account Balance as of 5/28/2025  
**\$656.77** View Account

Investment Value \$23,846.21

Manage your spending and savings accounts.

Shortcuts

[Submit a Claim](#)  
[Manage Bank Account](#)  
[Manage Cards](#)  
[See Statements](#)  
[Report a Card Lost or Stolen](#)

HSA store  
Premium products,  
Trusted brands,  
100% eligibility  
guaranteed.  
[Shop HSA Store](#)



# Account Statements

## HSA Members

DashboardAccounts ▾Investments ▾Claims ▾Manage ▾Statements ▾









✓ Account Statements

✓ Tax Statements

✓ Investment Statement

✓ Investment Trade Confirmation

✓ Statement Preferences

Statement Date ▾	Actions ▾
03/31/2025	
12/31/2024	
09/30/2024	
06/30/2024	
03/31/2024	
12/31/2023	
09/30/2023	
06/30/2023	

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 D. Doe  
123 MAIN ST  
ANYTOWN NY 11178

Your Healthcare Account Statement

January 1, 2025 through March 31, 2025  
Account Number 1234567890

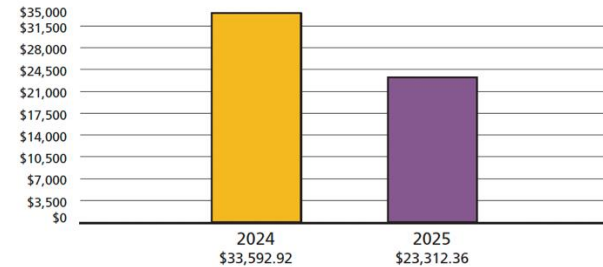
Contact Information:

866-520-4472

Fair Market Value as of March 31, 2025



Fair Market Value

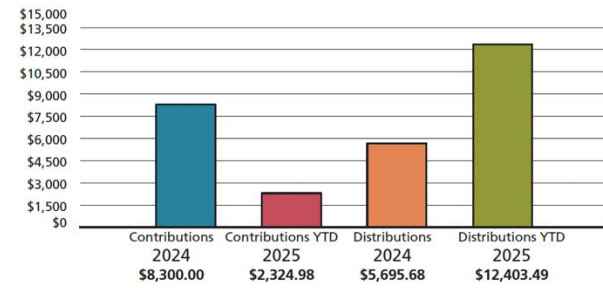


For Your Information

<sup>1</sup> Funds in this account are insured by the FDIC to the maximum permitted by law

<sup>3</sup> 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.

Contributions & Distributions



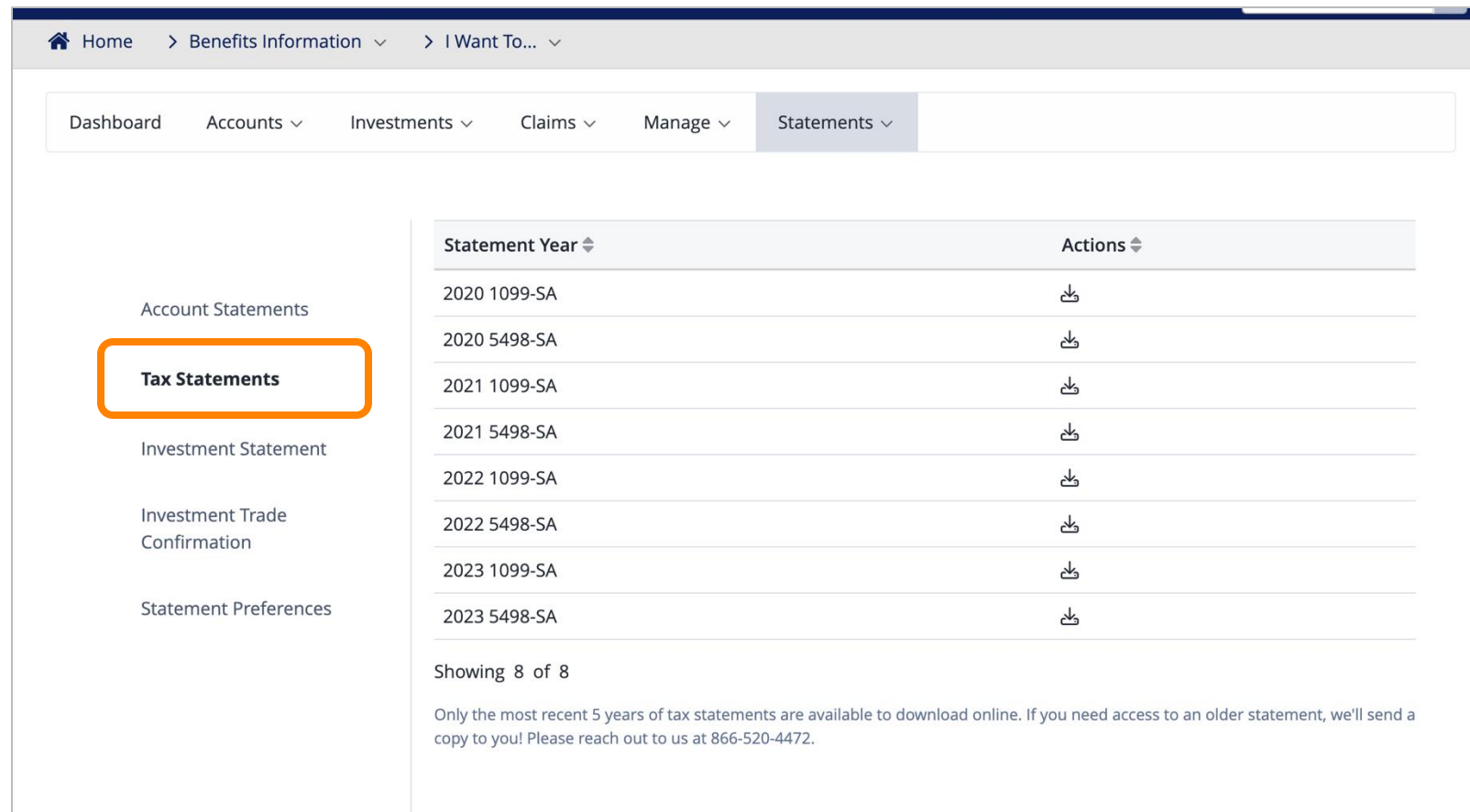
048865 2/3

page 3 of 6

# »»» Tax Statements

## Available annually

- 1099 posts in January
- 5498 posts in May



The screenshot shows the 'Tax Statements' page in the Businessolver interface. The top navigation bar includes 'Home', 'Benefits Information', and 'I Want To...'. Below this is a secondary navigation bar with 'Dashboard', 'Accounts', 'Investments', 'Claims', 'Manage', and 'Statements' (which is highlighted). On the left side, there is a sidebar menu with '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 columns for 'Statement Year' and 'Actions'. The table lists 8 statements from 2020 to 2023, each with a download icon. Below the table, it says 'Showing 8 of 8' and provides a note about the availability of older statements.

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

Dashboard Accounts ▾ Investments ▾ Claims ▾ Manage ▾ Statements ▾		
<div><div>✓ Account Statements</div><div>✓ Tax Statements</div><div>✓ <b>Investment Statement</b></div><div>✓ Investment Trade Confirmation</div><div>✓ Statement Preferences</div></div>	Date ▾	Actions ▾
	02/29/2024	⬇
	03/31/2024	⬇
	04/30/2024	⬇
	05/31/2024	⬇
	06/30/2024	⬇
	07/31/2024	⬇
	08/31/2024	⬇
	09/30/2024	⬇
	10/31/2024	⬇
	11/30/2024	⬇
	12/31/2024	⬇
	01/31/2025	⬇
	02/28/2025	⬇
	03/31/2025	⬇
	04/30/2025	⬇
Showing 15 of 15		



# 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

Clearing and execution services provided by DriveWealth, LLC member FINRA and SIPC. DriveWealth, LLC is a wholly owned subsidiary of DriveWealth Holdings, Inc.

Custodial services provided by DriveWealth, LLC, Citibank, N.A., RBC Clearing and Custody, and Wedbush Securities Inc.

All DriveWealth trademarks are the property of DriveWealth and its affiliates. Any third-party trademarks appearing on this statement are provided with the consent of such third party and are the property of their respective owners.

Page 1 of 9

# Investment Trade Confirmation

## Available for each transaction

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

Home > Benefits Information > I Want To...	
Dashboard Accounts Investments Claims Manage Statements	
Account Statements	
Tax Statements	
Investment Statement	
<b>Investment Trade Confirmation</b>	
Statement Preferences	
Date	Actions
02/14/2024	
02/26/2024	
02/29/2024	
03/01/2024	
03/06/2024	
03/08/2024	
03/11/2024	
03/25/2024	
03/27/2024	
04/08/2024	
04/18/2024	
04/19/2024	
04/22/2024	
05/03/2024	
05/17/2024	





# Transaction Confirmation

Sample

mychoiceAccounts

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

©Businessolver.com, Inc. 2025 – Private and Confidential – Not for Distribution

# 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

