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# 2022 FORM 5498

IRA Contribution Information  
*Copy B for Participant*  
 (OMB NO. 1545-0747)

**RECIPIENT'S NAME AND ADDRESS:**

Participant's Identification Number

CORRECTED (IF CHECKED)

1. IRA Contributions (other than amounts in Boxes 2-4, 8-10 and 13a.)	2. Rollover Contributions	3. Roth IRA Conversion Amount	4. Recharacterized Contributions	5. Fair Market Value of Account as of 12/31/22	7. Plan Type	8. SEP Contributions	9. SIMPLE Contributions	10. Roth IRA Contributions	11. If checked, required minimum distribution for 2023	13a. Postponed Contributions	13b. Year	13c. Code
<b>Trustee's or Issuer's Name:</b>				<b>Trustee's or Issuer's Federal ID Number:</b>				<b>Fund:</b>				

- 1** Shows the traditional IRA contributions for 2022 that you made in 2022 and through April 15, 2023. These contributions may be deductible on your Form 1040 or 1040-SR. However, if you or your spouse was an active participant in an employer's pension plan, these contributions may not be deductible. This box does not include amounts in Boxes 2-4, 8-10 and 13a.
- 2** Shows any rollover, including a direct rollover to a traditional IRA or Roth IRA or a qualified rollover contribution (including a military death gratuity or SGLI payment) to a Roth IRA, you made in 2022. It does not show any amounts you converted from your traditional IRA, SEP IRA, or SIMPLE IRA to a Roth IRA. Those contributions are shown in Box 3. It does not show any late rollover contributions. See the Form 1040 or 1040-SR instructions for information on how to report rollovers. If you have ever made any nondeductible contributions to your traditional IRA or SEP IRA and you did not roll over the total distribution, use Form 8606, Nondeductible IRAs, to figure the taxable amount. If property was rolled over, see Pub. 590-A. For a qualified rollover to a Roth IRA, see Pub. 590-A.
- 3** Shows the amount converted from a traditional IRA, SEP IRA, or SIMPLE IRA to a Roth IRA in 2022. Use Form 8606 to figure the taxable amount.
- 4** Shows amounts recharacterized from transferring any part of the contribution (plus earnings) from one type of IRA to another. See Pub. 590-A.
- 5** This is the fair market value (FMV) of your IRA, SEP, SIMPLE, Roth, or Roth Conversion account at the end of the year. However, if a decedent is shown as the participant on this form, it may be the FMV on the date of death. If a decedent's name is shown as the participant and the FMV is shown as zero, the executor or administrator of the decedent's estate may request a date-of-death value from the financial institution.
- 7** Shows whether this Form 5498 is for your IRA, SEP, SIMPLE or Roth.
- 8** Shows the SEP contributions made in 2022, including contributions made in 2022 for 2021, but not including contributions made in 2023 for 2022. If made by your employer, do not deduct on your income tax return. If you made contributions as a self-employed person (or partner), they may be deductible. See Pub. 560.9

- 9** Shows the SIMPLE contributions made in 2022 on your behalf. If made by your employer, do not deduct on your income tax return. If you made the contributions as a self-employed person (or partner), they may be deductible. See Pub. 560.10
- 10** Shows Roth IRA contributions you made in 2022 and through April 18, 2023. Do not deduct on your income tax return.
- 11** If the box is checked, you must take a required minimum distribution (RMD) for 2023. An RMD may be required even if the box is not checked. If you do not take the RMD for 2023, you are subject to a 50% excise tax on the amount not distributed. See Pub. 590-B for details.
- 13a** Shows the amount of a late rollover contribution (more than 60 days after distribution) made in 2022 and certified by the participant, or a postponed contribution made in 2022 for a prior year. This amount is not reported in box 1 or 2.
- 13b** Shows the year to which the postponed contribution in box 13a was credited. If a late rollover contribution is shown in box 13a, this box will be blank.
- 13c** For participants who made a postponed contribution due to an extension of the contribution due date because of a federally designated disaster, shows the code FD.  
 For participants who served in designated combat zones, qualified hazardous duty areas, or direct support areas, shows the appropriate code. The codes are: EO13239 for Afghanistan and associated direct support areas, EO12744 for the Arabian Peninsula areas, PL115-97 for the Sinai Peninsula of Egypt, and EO13119 (or PL106-21) for the Yugoslavia operations areas. For additional information, including a list of locations within the designated combat zones, qualified hazardous duty areas, and direct support areas, see Pub. 3. For updates to the list of locations, go to [www.irs.gov/Newsroom/Combat-Zones](http://www.irs.gov/Newsroom/Combat-Zones).  
 For a participant who makes a rollover of a qualified plan loan offset, shows the code PO.  
 For a participant who has used the self-certification procedure for a late rollover contribution, shows the code SC.