

2023
S Corporation Health Insurance Premium Reporting
(Form W-2)

Company Name

Date

Name of Person Completing Form

The optimal way to maximize your health insurance premium tax deductions (when you are a greater than 2% owner in an S Corporation), is to have the premiums included in your Form W-2 reporting. **You are only eligible for claiming the Self-Employment Health Insurance deduction when the premiums are included in the Form W-2 reporting.**

Provide the amount of insurance premiums paid (below) for health/dental/vision coverage for the tax year for each person holding more than a 2% interest in the S Corporation.

| Name (>2% OWNER) | Paid Code ^(a) | Annual Amount |
|------------------|--------------------------|---------------|
| | | |
| | | |
| | | |

^(a) Paid Codes:

- (1) Insurance premiums paid by company
- (2) Insurance premiums paid by owner

Payroll Assist:

If you desire assistance from REB in entering this information in your ADP payroll interface to take advantage of this tax deduction, provide this completed form to us by **December 20, 2022**.