

FIDELITY BROKERAGE SERVICES LLC P.O. Box 28019 Albuquerque, NM 87125-8019

# 2020 TAX REPORTING STATEMENT

PRIYADARSINI KODUKULA

Account No. **X94-525217** Customer Service: 800-544-6666 Recipient ID No. \*\*\*-\*\*-**5618** Payer's Fed ID Number: 04-3523567

eDelivered

### PRIYADARSINI KODUKULA 4116 176TH PL SE BOTHELL WA 98012-7487

Payer's Name and Address: NATIONAL FINANCIAL SERVICES LLC 499 WASHINGTON BLVD JERSEY CITY, NJ 07310

Form 1099-DIV *	2020 Dividends and	Distributions	Copy B for Recipient (OMB No. 1545-0110)
1a Total Ordinary Dividends 1b Qualified Dividends		7 Foreign Tax Paid 8 Foreign Country or U.S. Possession	
2a Total Capital Gain Distributions	0.00	9 Cash Liquidation Distributions	
2b Unrecap. Sec 1250 Gain	0.00	10 Non-Cash Liquidation Distributions	
2c Section 1202 Gain	0.00	11 Exempt Interest Dividends	0.00
2d Collectibles (28%) Gain	0.00	12 Specified Private Activity Bond Interest Dividends	0.00
3 Nondividend Distributions	0.00	13 State	
4 Federal Income Tax Withheld	0.00	14 State Identification No.	
5 Section 199A Dividends	0.00	15 State Tax Withheld	0.00
6 Investment Expenses	0.00		

### Form 1099-INT \*

#### 2020 Interest Income

1 Interest Income	0.00
2 Early Withdrawal Penalty	0.00
3 Interest on U.S. Savings Bonds and Treas. Obligations	
4 Federal Income Tax Withheld	0.00
5 Investment Expenses	0.00
6 Foreign Tax Paid	0.00
7 Foreign Country or U.S. Possession	
8 Tax-Exempt Interest	0.00
9 Specified Private Activity Bond Interest	

10 Market Discount	0.00
11 Bond Premium	0.00
12 Bond Premium on U.S. Treasury Obligations	
13 Bond Premium on Tax-Exempt Bond	0.00
14 Tax-Exempt Bond CUSIP no	
15 State	
16 State Identification No	
17 State Tax Withheld	0.00

\* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

Copy B for Recipient (OMB No. 1545-0112)

PRIYADARSINI KODUKULA

Account No. **X94-525217** Customer Service: 800-544-6666 Recipient ID No. \*\*\***-**\*\***-**5618 Payer's Fed ID Number: 04-3523567

Form 1099-MISC *	2020 Miscellaneous	Income	Copy B for Recipient (OMB No. 1545-0115)
<ol> <li>Royalties</li></ol>	0.00 <b>0.00</b>	15 State Tax Withheld 16 State/Payer's State No. 17 State Income	

#### Summary of 2020 Proceeds From Broker and Barter Exchange Transactions

1099-B Section	Total Proceeds	Total Cost Basis	Total Market Discount	Total Wash Sales	Realized Gain/Loss	Federal Income Tax Withheld
Short-term transactions for which basis is reported to the IRS	0.00	0.00	0.00	0.00	0.00	0.00
Short-term transactions for which basis is not reported to the IRS	0.00	0.00	0.00	0.00	0.00	0.00
Long-term transactions for which basis is reported to the IRS	61,454.96	31,286.69	0.00	0.00	30,168.27	0.00
Long-term transactions for which basis is not reported to the IRS	0.00	0.00	0.00	0.00	0.00	0.00
Transactions for which basis is not reported to the IRS and Term is Unknown	0.00	0.00	0.00	0.00	0.00	0.00
	61,454.96	31,286.69	0.00	0.00	30,168.27	0.00

1099-B amounts are reported individually to the IRS. Refer to the Form 1099-B sections in this statement, if applicable.

#### Summary of 2020 Original Issue Discount

Total Original Issue Discount	0.00
Total Original Issue Discount on U.S. Treasury Obligations	
Total Original Issue Discount on Tax-Exempt Obligations	

Total Original Issue Discount - REMIC ......0.00

Original Issue Discount (OID) amounts are reported individually to the IRS. Refer to the Form 1099-OID pages in this statement, if applicable.

\* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.



PRIYADARSINI KODUKULA

(IRS Form 1099-B box numbers are shown below in **bold** type)

Account No. X94-525217 Customer Service: 800-544-6666 Recipient ID No. \*\*\*-\*\*-5618 Paver's Fed ID Number: 04-3523567

### FORM 1099-B\*

Action

### 2020 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

4 Federal

Income Tax

14 State

16 State Tax

Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II Proceeds are reported as gross proceeds unless otherwise indicated (a). (This Label is a Substitute for Boxes 2, 5, 6 & 12)

1a Description of property, Stock or Other Symbol, CUSIP Quantity 1b Date 1c Date Sold 1d Proceeds 1e Cost or 1f Accrued 1g Wash Sale Gain/Loss (-) or Disposed Other Basis (b) Acquired Market Loss

	,	loquired of	Disposed			Discount	Disallowed		Withheld	Withheld
MICROSOFT CO	RP, MSFT, 5949	18104								
Sale	46.123	03/29/18	06/11/20	8,748.42	3,788.55(e)			4,959.87		
Sale	53.239	06/29/18	06/11/20	10,098.15	4,724.96(e)			5,373.19		
Sale	64.000	09/28/18	06/11/20	12,139.25	6,587.52(e)			5,551.73		
Sale	54.193	12/31/18	06/11/20	10,279.10	4,953.78(e)			5,325.32		
Sale	59.000	01/16/19	06/11/20	11,190.87	6,195.59			4,995.28		
Sale	47.445	03/29/19	06/11/20	8,999.17	5,036.29(e)			3,962.88		
Subtotals				61,454.96	31,286.69					
TOTALS				61,454.96	31,286.69	0.00	0.00		0.00	
		Box D Lon	g-Term Realized	Gain				30,168.27		
		Box D Lon	g-Term Realized	Loss				0.00		

For any transaction listed on Form 1099-B in a section indicating that "basis is reported to the IRS", we are reporting to the IRS: 1a Description of Property, 2 type of gain or loss (i.e. short-term or long-term), 3 Proceeds from QOF (Qualified Opportunity Fund), 6 Gross or Net Proceeds, 12 basis reported to IRS, and columns 1b, 1c, 1d, 1e, 1f, 1g, 4, 7, 14, 15 and 16. We are not reporting to the IRS: the Action, the Gain/Loss, and all subtotals and totals.

For any transaction listed on Form 1099-B in a section indicating that "basis is not reported to the IRS", we are reporting to the IRS: 1a Description of Property, 3 Proceeds from QOF (Qualified Opportunity Fund), 5 Noncovered security, 6 Gross or Net Proceeds, and columns 1c, 1d, 4, 14, 15 and 16. We are not reporting to the IRS: 2 type of gain or loss (i.e. short-term or long-term), the Action, the Gain/Loss, columns 1b. 1e. 1f. 1g. 2, 7 and 12 and all subtotals and totals.

For any section 1256 option contracts we are reporting to the IRS: 1a Description of Property and totals for boxes 8, 9, 10 and 11.

Although Fidelity makes every effort to provide accurate information, please bear in mind that you, the taxpayer, are ultimately responsible for the accuracy of your tax returns.

Cost or other basis provided may include adjustments including, but not limited to, dividend reinvestment, return of capital/principal, wash sale loss disallowed, amortization, accretion, acquisition (b) premium, bond premium, market discount, market premium, and option premium.

\* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.



PRIYADARSINI KODUKULA

Account No. **X94-525217** Customer Service: 800-544-6666 Recipient ID No. \*\*\*-\*\*-**5618** Payer's Fed ID Number: 04-3523567

### FORM 1099-B\*

### 2020 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

(e) Your 1099-B reflects shares disposed of that were acquired through your employers stock plan. Cost basis associated with these shares may not have been adjusted for any compensation income that was associated with those shares in the year of acquisition or disposal. Please consult a tax advisor for the rules specific to your grant and plan. Refer to the Supplemental Stock Plan Service Lot Detail section of this form for additional detail.

Amortization, accretion, and similar adjustments to cost basis are not provided for short-term instruments and unit investment trusts.

\* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.



PRIYADARSINI KODUKULA

Account No. **X94-525217** Customer Service: 800-544-6666 Recipient ID No. \*\*\*-\*\*-**5618** Payer's Fed ID Number: 04-3523567

#### Summary of 2020 Supplemental Information Not Reported to the IRS

Margin Interest Paid	0.00
Tax Exempt Investment Expense	0.00
Accrued Interest Paid on Purchases	0.00
Proceeds Investment Expenses	0.00
Severance Tax	0.00
Administrative Expenses	0.00
Non-deductible Generic Expenses	0.00
Deductible Generic Expenses	0.00

Currency Realized Gain/Loss (USD)	0.00
Actual Payment Shortfall	
Addition to Basis	
Account Fees	0.00
Short Dividends	0.00
Money Market Realized Gain/Loss	0.00
Short/Long Term Realized Gain/Loss	0.00
Mortgage Pool Statement (MBS)	0.00

\* This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

## **2020 SUPPLEMENTAL INFORMATION**

PRIYADARSINI KODUKULA

Account No. X94-525217 Customer Service: 800-544-6666

Recipient ID No. \*\*\*-\*\*-5618 Payer's Fed ID Number: 04-3523567

#### Note: This information is not reported to the IRS. It may assist you in tax return preparation.

### **Details of 1099-DIV Transactions**

	ary Dividends and D Symbol, CUSIP	istributions Deta						
Date	<b>1a</b> Total Ordinary Dividends (includes 1b and 5)	Dividend Distributions	Short-Term Capital Gains	<b>1b</b> Qualified Dividends	5 Section 199A Dividends	11 Exempt Interest Dividends	12 Specified Private Activity Bond Interest Dividends	<b>7</b> Foreigr Tax Paid
FIDELITY G	OVERNMENT MONEY MA	ARKET, SPAXX, 3161	7H102					
01/31/20	0.21	0.21						
02/28/20	0.21	0.21						
03/31/20	4.75	4.75						
04/30/20	0.14	0.14						
05/29/20	0.09	0.09						
06/30/20	0.35	0.35						
07/31/20	0.61	0.61						
08/31/20	0.61	0.61						
09/30/20	0.59	0.59						
10/30/20	0.60	0.60						
11/30/20	0.59	0.59						
12/31/20	0.62	0.62						
Subtotals	9.37	9.37						
MICROSOF	T CORP, MSFT, 59491810	)4						
03/12/20	315.80			315.80				
06/11/20	363.59			363.59				
09/10/20	225.83			225.83				
12/10/20	313.62			313.62				
Subtotals	1,218.84			1,218.84				
TOTALS	1,228.21	9.37	0.00	1,218.84	0.00	0.00	0.00	0.00

Short-term capital gain distributions reported on monthly/quarterly account statements are included in 1a Total Ordinary Dividends on Form 1099-DIV.

To see the 2020 State Percentages of Tax-Exempt Income for Fidelity Federal Tax-Exempt Funds or the Percentage of Income from U.S. Government Securities for applicable Fidelity Funds, visit Fidelity.com/fundtaxinfo.



## **2020 SUPPLEMENTAL INFORMATION**

PRIYADARSINI KODUKULA

Account No. **X94-525217** Customer Service: 800-544-6666 Recipient ID No. \*\*\*-\*\*-5618 Payer's Fed ID Number: 04-3523567

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

#### **Detail Information**

## Supplemental Stock Plan Lot Detail

Based on the disposal method you have selected, the lots that appear on your 1099 Supplemental may differ from the lots on the 1099-B.

### **Long-Term Transactions**

Grant Type (w)	Quantity	Date of Acquisition (x)	Date Sold or Disposed	Proceeds	Ordinary Income Reported (y)	Adjusted Cost or Other Basis (z)	Wash Sale Loss Disallowed	Adjusted Gain/Loss
MICROSOFT COR	P, MSFT, 594918104							
QSP	46.123	03/29/18	06/11/20	8,748.42	396.43	4,184.98	0.00	4,563.44
QSP	53.239	06/29/18	06/11/20	10,098.15	471.27	5,196.23	0.00	4,901.92
QSP	64.000	09/28/18	06/11/20	12,139.25	732.16	7,319.68	0.00	4,819.57
QSP	54.193	12/31/18	06/11/20	10,279.10	550.60	5,504.38	0.00	4,774.72
	59.000	01/16/19	06/11/20	11,190.87	0.00	6,195.59	0.00	4,995.28
QSP	47.445	03/29/19	06/11/20	8,999.17	559.38	5,595.67	0.00	3,403.50
		Totals		61,454.96 Long-Term Adjusted	Realized Gain	33,996.53		27,458.43
				Long-Term Adjusted	Realized Loss			0.00
				Wash Sale Loss Disa	llowed		0.00	

(w) Grant Type describes the equity award source of the lot you sold this tax year. Please see the Grant Type table for additonal description.

Grant Type	Equity Award Type	Acquisition date represents:
DO	Deposit Only Shares	Deposit Date
NQSOP	Non Qualified Stock Option Shares	Exercise Date
NQSP	Non Qualified ESPP Shares	Purchase Date
NSR	Non-Incentive SAR (NSR)	Exercise Date
QSOP	Qualified Stock Option Shares	Exercise Date
QSP	Qualified ESPP Shares	Purchase Date
RSA	Restricted Awards	Vesting Date
RSU	Restricted Units	Distribution Date
RSU	Performance Units	Distribution Date
RSU	Total Shareholder Return Units	Distribution Date
SAR	Stock Appreciation Rights	Exercise Date



# **2020 SUPPLEMENTAL INFORMATION**

PRIYADARSINI KODUKULA

Account No. X94-525217 Customer Service: 800-544-6666 Recipient ID No. \*\*\*-\*\*-5618 Payer's Fed ID Number: 04-3523567

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

**Detail Information** 

Supplemental Stock Plan Lot Detail

Based on the disposal method you have selected, the lots that appear on your 1099 Supplemental may differ from the lots on the 1099-B.

(x) Date of Acquisition is the date that shares were acquired from your Equity Plan and deposited into your brokerage account.

- (y) Fidelity-calculated ordinary income that was reported on the W2 from the year you acquired the shares. Fidelity-calculated ordinary income does not include any adjustments that your company has made. Fidelity is not responsible for any adjustments that your company may have made to this number.
- (z) Adjusted cost or other basis provided may include the following adjustments: ordinary income reported, dividend reinvestment, return of capital/principal and wash sale loss disallowed.

Important Tax Return Document Enclosed.

