



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

# 2021 TAX REPORTING STATEMENT

RUTA SANJAY BHAT

Account No. **Z06-599767** Customer Service: 800-544-6666  
 Recipient ID No. **\*\*\*-\*\*-2578** Payer's Fed ID Number: 04-3523567

**Due to de minimis rules this form is not filed with the IRS.**

eDelivered

RUTA SANJAY BHAT  
 9 E CENTRAL AVE APT 222  
 PAOLI PA 19301-1560

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

## Form 1099-DIV

### 2021 Dividends and Distributions

Copy B for Recipient  
 (OMB No. 1545-0110)

1a Total Ordinary Dividends .....	5.60	7 Foreign Tax Paid.....	0.00
1b Qualified Dividends .....	5.46	8 Foreign Country or U.S. Possession.....	0.00
2a Total Capital Gain Distributions .....	0.00	9 Cash Liquidation Distributions.....	0.00
2b Unrecap. Sec 1250 Gain.....	0.00	10 Non-Cash Liquidation Distributions.....	0.00
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 .....	0.00
<b>4 Federal Income Tax Withheld .....</b>	<b>0.00</b>	14 State Identification No. ....	0.00
5 Section 199A Dividends .....	0.14	15 State Tax Withheld.....	0.00
6 Investment Expenses.....	0.00		

## Form 1099-INT

### 2021 Interest Income

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

1 Interest Income .....	0.00	10 Market Discount .....	0.00
2 Early Withdrawal Penalty .....	0.00	11 Bond Premium .....	0.00
3 Interest on U.S. Savings Bonds and Treas. Obligations .....	0.00	12 Bond Premium on U.S. Treasury Obligations .....	0.00
<b>4 Federal Income Tax Withheld .....</b>	<b>0.00</b>	13 Bond Premium on Tax-Exempt Bond .....	0.00
5 Investment Expenses .....	0.00	14 Tax-Exempt Bond CUSIP no. ....	0.00
6 Foreign Tax Paid .....	0.00	15 State .....	0.00
7 Foreign Country or U.S. Possession .....	0.00	16 State Identification No .....	0.00
8 Tax-Exempt Interest .....	0.00	17 State Tax Withheld .....	0.00
9 Specified Private Activity Bond Interest .....	0.00		



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## Form 1099-MISC

## 2021 Miscellaneous Information

Copy B for Recipient  
(OMB No. 1545-0115)

2 Royalties .....	0.00	15 State Tax Withheld .....	0.00
3 Other Income .....	0.00	16 State/Payer's State No. ....	
<b>4 Federal Income Tax Withheld .....</b>	<b>0.00</b>	17 State Income .....	0.00
8 Substitute Payments in Lieu of Dividends or Interest .....	0.00		

## Summary of 2021 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 <u>reported</u> to the IRS	0.00	0.00	0.00	0.00	0.00	0.00
Short-term transactions for which basis is <u>not reported</u> to the IRS	0.00	0.00	0.00	0.00	0.00	0.00
Long-term transactions for which basis is <u>reported</u> to the IRS	0.00	0.00	0.00	0.00	0.00	0.00
Long-term transactions for which basis is <u>not reported</u> 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
	0.00	0.00	0.00	0.00	0.00	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 2021 Original Issue Discount

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





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## Summary of 2021 Supplemental Information Not Reported to the IRS

Margin Interest Paid .....	0.00	Currency Realized Gain/Loss (USD) .....	0.00
Tax Exempt Investment Expense .....	0.00	Actual Payment Shortfall.....	0.00
Accrued Interest Paid on Purchases .....	0.00	Addition to Basis .....	0.00
Proceeds Investment Expenses .....	0.00	Account Fees.....	0.00
Severance Tax .....	0.00	Short Dividends.....	0.00
Administrative Expenses .....	0.00	Money Market Realized Gain/Loss.....	0.00
Non-deductible Generic Expenses .....	0.00	Short/Long Term Realized Gain/Loss.....	0.00
Deductible Generic Expenses .....	0.00	Mortgage Pool Statement (MBS).....	0.00



# 2021 SUPPLEMENTAL INFORMATION

RUTA SANJAY BHAT

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Recipient ID No. **\*\*\*-\*\*-2578** 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

### Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP								
Date	1a Total Ordinary Dividends (includes 1b and 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	5 Section 199A Dividends	11 Exempt Interest Dividends	12 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
SELECT SECTOR SPDR TR FINANCIAL, XLF, 81369Y605								
12/23/21	0.37			0.37				
SELECT SECTOR SPDR TRUST TECHNOLOGY, XLK, 81369Y803								
12/23/21	0.63			0.63				
VANGUARD INDEX FUNDS S&P 500 ETF USD, VOO, 922908363								
12/27/21	4.60			4.46	0.14			
<b>TOTALS</b>	<b>5.60</b>	<b>0.00</b>	<b>0.00</b>	<b>5.46</b>	<b>0.14</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

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 **2021** 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](https://www.fidelity.com/fundtaxinfo).

**Important Tax Return Document Enclosed.**

