



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

# 2021 TAX REPORTING STATEMENT

SHANMUGAM PETHAPERUMAL

Account No. X96-825220 Customer Service: 800-544-6666  
Recipient ID No. \*\*\*-\*\*-8323 Payer's Fed ID Number: 04-3523567

eDelivered

SHANMUGAM PETHAPERUMAL  
POORNIMADEVI MUTHAIAN  
8822 OLD SPANISH TRL  
LITTLE ROCK AR 72227-3240

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 .....	278.36
1b Qualified Dividends .....	278.36
2a Total Capital Gain Distributions .....	0.00
2b Unrecap. Sec 1250 Gain .....	0.00
2c Section 1202 Gain .....	0.00
2d Collectibles (28%) Gain .....	0.00
3 Nondividend Distributions .....	0.00
4 Federal Income Tax Withheld .....	0.00
5 Section 199A Dividends .....	0.00
6 Investment Expenses .....	0.00
7 Foreign Tax Paid .....	0.00
8 Foreign Country or U.S. Possession .....	0.00
9 Cash Liquidation Distributions .....	0.00
10 Non-Cash Liquidation Distributions .....	0.00
11 Exempt Interest Dividends .....	0.00
12 Specified Private Activity Bond Interest Dividends .....	0.00
13 State .....	0.00
14 State Identification No. ....	0.00
15 State Tax Withheld .....	0.00

## Form 1099-INT \*

### 2021 Interest Income

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

1 Interest Income .....	0.00
2 Early Withdrawal Penalty .....	0.00
3 Interest on U.S. Savings Bonds and Treas. Obligations .....	0.00
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 .....	0.00
8 Tax-Exempt Interest .....	0.00
9 Specified Private Activity Bond Interest .....	0.00
10 Market Discount .....	0.00
11 Bond Premium .....	0.00
12 Bond Premium on U.S. Treasury Obligations .....	0.00
13 Bond Premium on Tax-Exempt Bond .....	0.00
14 Tax-Exempt Bond CUSIP no. ....	0.00
15 State .....	0.00
16 State Identification No. ....	0.00
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.



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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. ....	
4 Federal Income Tax Withheld .....	0.00	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 reported to the IRS	6,249.66	4,512.90	0.00	0.00	1,736.76	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	0.00	0.00	0.00	0.00	0.00	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
	6,249.66	4,512.90	0.00	0.00	1,736.76	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	Original Issue Discount (OID) amounts are reported individually to the IRS. Refer to the Form 1099-OID pages in this statement, if applicable.	
Total Original Issue Discount on Tax-Exempt Obligations .....	0.00		

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FORM 1099-B\*

## 2021 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

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

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

1a Description of property, Stock or Other Symbol, CUSIP	Quantity	1b Date Acquired	1c Date Sold or Disposed	1d Proceeds	1e Cost or Other Basis (b)	1f Accrued Market Discount	1g Wash Sale Loss Disallowed	Gain/Loss (-)	4 Federal Income Tax Withheld	14 State Tax Withheld
INFINITY PHARMACEUTICALS INC, INF1, 45665G303	Sale	300,000	07/28/21	08/12/21	921.62	737.73		183.89		
MARIN SOFTWARE INC COM NEW, MRIN, 56804T205	Sale	300,000	06/29/21	06/29/21	4,199.97	2,799.00		1,400.97		
Pfizer Inc, PFE, 717081103	Sale	23,728	12/02/20	08/12/21	1,115.30	966.81		148.49		
	Sale	0,272	03/08/21	08/12/21	12.77	9.36		3.41		
<b>Subtotals</b>					1,128.07	976.17				
<b>TOTALS</b>					6,249.66	4,512.90	0.00	0.00	1,736.76	0.00
									Box A Short-Term Realized Gain	
									Box A Short-Term Realized Loss	

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.

(b) 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 premium, bond premium, market discount, market premium, and option premium.

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FORM 1099-B\*

2021 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

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

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

Margin Interest Paid .....	608.83	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 Fee .....	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

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# 2021 SUPPLEMENTAL INFORMATION

SHANMUGAM PETHAPERUMAL

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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	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
BK OF AMERICA CORP COM, BAC, 060505104								
09/24/21	120.75			120.75				
12/31/21	120.75			120.75				
<b>Subtotals</b>	<b>241.50</b>			<b>241.50</b>				
-----								
MICRON TECHNOLOGY INC, MU, 595112103								
10/18/21	27.50			27.50				
-----								
PFIZER INC, PFE, 717081103								
09/07/21	9.36			9.36				
<b>TOTALS</b>	<b>278.36</b>	<b>0.00</b>	<b>0.00</b>	<b>278.36</b>	<b>0.00</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).





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## Margin Interest Paid

Description	Date	Amount
MARGIN INTEREST @ 8.325% AVG B	06/20/21	28.72
MARGIN INTEREST @ 8.325% AVG B	07/20/21	69.88
MARGIN INTEREST @ 8.325% AVG B	08/22/21	92.52
MARGIN INTEREST @ 8.325% AVG B	09/20/21	72.42
MARGIN INTEREST @ 8.325% AVG B	10/20/21	74.61
MARGIN INTEREST @ 8.325% AVG B	11/21/21	102.93
MARGIN INTEREST @ 8.325% AVG B	12/20/21	124.52
MARGIN INTEREST @ 8.325% AVG B	12/30/21	43.23
<b>TOTAL</b>		<b>608.83</b>

Important Tax Return Document Enclosed.

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