

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

## 2021 TAX REPORTING STATEMENT

**RAJESH IYER** 

Account No. **Z05-347507** Customer Service: 800-544-6666 Recipient ID No. \*\*\*-\*\*-**4948** Payer's Fed ID Number: 04-3523567

eDelivered

RAJESH IYER 233 PODUNK RD STURBRIDGE MA 01566 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 Recipier (OMB No. 1545-0110
1a Total Ordinary Dividends		7 Foreign Tax Paid	
4 Federal Income Tax Withheld	0.00	14 State Identification No	

Form 1099-INT *	2021 Interes	t Income	Copy B for Recipient (OMB No. 1545-0112)
1 Interest Income	0.39	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
4 Federal Income Tax Withheld		13 Bond Premium on Tax-Exempt Bond	0.00
5 Investment Expenses	0.00	14 Tax-Exempt Bond CUSIP no	
6 Foreign Tax Paid	0.00	15 State	
7 Foreign Country or U.S. Possession		16 State Identification No	
8 Tax-Exempt Interest		17 State Tax Withheld	0.00
9 Specified Private Activity Bond Interest	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.

01/17/2022 9001000000 Pages 1 of 8



RAJESH IYER

Account No. **Z05-347507** Customer Service: 800-544-6666 Recipient ID No. \*\*\*-\*\*-**4948** Payer's Fed ID Number: 04-3523567

Form 1099-MISC *	2021 Miscellaneou	S Information Copy B for Recipient (OMB No. 1545-0115)
2 Royalties	0.00	
3 Other Income	0.00	15 State Tax Withheld
4 Federal Income Tax Withheld	0.00	16 State/Payer's State No.
8 Substitute Payments in Lieu of Dividends or Interest	0.00	17 State Income

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	0.00	0.00	0.00	0.00	0.00	0.00
Short-term transactions for which basis is not reported to the IRS	21,366.75	0.00	0.00	0.00	21,366.75	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
	21,366.75	0.00	0.00	0.00	21,366.75	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	Total Original Issue Discount - REMIC			
Total Original Issue Discount on Tax-Exempt Obligations	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.





Z05-347507 Customer Service: Recipient ID No. \*\*\*-\*\*-4948 Payer's Fed ID Number: 04-3523567

#### 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 not reported to the IRS --report on Form 8949 with Box B 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)

Action	Quantity '	Ib Date Acquired	<b>1c</b> Date Sold or Disposed	1d Proceeds	<b>1e</b> Cost or Other Basis (b)	1f Accrued Market Discount	1g Wash Sale Loss Disallowed	Gain/Loss (-)	4 Federal Income Tax Withheld	14 State 16 State Tax Withheld
WAYFAIR INC,	N, 94419L101									
Sale	11.000	02/01/21	02/02/21	3,070.23	0.00(e)			3,070.23		
Sale	12.000	05/01/21	05/04/21	3,282.90	0.00(e)			3,282.90		
Sale	20.000	02/01/21	05/27/21	6,428.17	0.00(e)			6,428.17		
Sale	9.000	05/01/21	05/27/21	2,892.67	0.00(e)			2,892.67		
Sale	12.000	08/01/21	08/03/21	2,933.13	0.00(e)			2,933.13		
Sale	11.000	11/01/21	11/02/21	2,759.65	0.00(e)			2,759.65		
Subtotals				21,366.75	0.00					
TOTALS				21,366.75	0.00	0.00	0.00		0.00	
		Box B S	hort-Term Realize	ed Gain				21,366.75		
		Box B S	hort-Term Realize	ed 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 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.

> 01/17/2022 9001000000 Pages 3 of 8



Z05-347507 Customer Service:

Recipient ID No. \*\*\*-\*\*-4948 Payer's Fed ID Number: 04-3523567

FORM 1099-B\*

### 2021 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

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. If there is no adjustment to basis, no Supplemental Stock Plan section will be included.

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.





RAJESH IYER

Account No. **Z05-347507** Customer Service: 800-544-6666 Recipient ID No. \*\*\*-\*\*-**4948** Payer's Fed ID Number: 04-3523567

Summary of 2021 Supplemental Information Not Reported to the IRS					
Margin Interest Paid		Currency Realized Gain/Loss (USD)			
Tax Exempt Investment Expense		Actual Payment Shortfall			
Proceeds Investment Expenses		Account Fees			
Severance Tax		Short Dividends  Money Market Realized Gain/Loss			
Non-deductible Generic Expenses		Short/Long Term Realized Gain/Loss	0.00		
Deductible Generic Expenses	0.00	Mortgage Pool Statement (MBS)			

\* 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.

01/17/2022 9001000000 Pages 5 of 8



## 2021 SUPPLEMENTAL INFORMATION

RAJESH IYER

Z05-347507 Customer Service: Recipient ID No. \*\*\*-\*\*-4948 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-INT Transactions**

### **Interest Income Details, Taxable Obligations**

Description, Symbol, CUSIP							
Date	1 Interest Income	<b>6</b> Foreign Tax Paid	11 Bond Premium	Noncovered Bond Premium	<b>10</b> Market Discount	Noncovered Market Discount	
CASH, FCASH,	315994103						
01/29/21	0.18						
02/26/21	0.13						
03/31/21	0.01						
04/30/21	0.01						
05/28/21	0.02						
06/30/21	0.02						
11/30/21	0.01						
12/31/21	0.01						
Subtotals	0.39						
TOTALS	0.39	0.00	0.00	0.00	0.00	0.00	



## 2021 SUPPLEMENTAL INFORMATION

**RAJESH IYER** 

Account No. **Z05-347507** Customer Service: 800-544-6666 Recipient ID No. \*\*\*-\*\*-**4948** Payer's Fed ID Number: 04-3523567

0.00

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.

#### **Short-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
WAYFAIR INC, W,	94419L101							
RSU	11.000	02/01/21	02/02/21	3,070.23	3,091.33	3,091.33	0.00	-21.10
RSU	12.000	05/01/21	05/04/21	3,282.90	3,362.16	3,362.16	0.00	-79.26
RSU	20.000	02/01/21	05/27/21	6,428.17	5,620.60	5,620.60	0.00	807.57
RSU	9.000	05/01/21	05/27/21	2,892.67	2,521.62	2,521.62	0.00	371.05
RSU	12.000	08/01/21	08/03/21	2,933.13	2,908.44	2,908.44	0.00	24.69
RSU	11.000	11/01/21	11/02/21	2,759.65	2,777.72	2,777.72	0.00	-18.07
		Totals		21,366.75		20,281.87		
			Sh	ort-Term Adjusted	d Realized Gain			1,203.31
			Sh	ort-Term Adjusted	Realized Loss			-118.43

Wash Sale Loss Disallowed

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

01/17/2022 9001000000 Pages 7 of 8



# 2021 SUPPLEMENTAL INFORMATION

**RAJESH IYER** 

Z05-347507 Customer Service: Recipient ID No. \*\*\*-\*\*-4948 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.

- Date of Acquisition is the date that shares were acquired from your Equity Plan and deposited into your brokerage account.
- 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.
- 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. In the case of publicly traded partnerships, the adjusted cost or other basis may not include distributions in excess of taxable income. Please consult your tax advisor and the information on your K-1 to determine if any adjustment to the cost basis is necessary.

Important Tax Return Document Enclosed.

