



Avinash Reddy Pothu  
2767 Tribune Ave  
Hayward, CA 94542

January 27, 2022

The following tax information represents a consolidated record of your applicable Fundrise investments for tax year 2021.

The information contained herein pertains only to investments in the Interval Funds and eREITs. If you invested in the Project Payment Dependent Notes, a 1099-INT package was delivered separately. If you hold shares in the Fundrise eFund or other direct equity investments, a Schedule K-1 or Form K-1 will be distributed upon completion, which is anticipated to occur in mid-March 2022.

Please note that we have changed our policy for issuing Forms 1099-DIV. In accordance with IRS regulations, we will no longer issue a Form 1099-DIV if your aggregate distributions from a fund (eREIT or Interval Fund) in the given tax year were less than \$10. This means that you may not receive tax documents for all of the funds in which you hold shares.

If you completed a share transfer in tax year 2021, the cost basis related to your redeemed shares has not been included on your Form(s) 1099-B. Fundrise is only able to track basis pertaining to originally issued shares.

Fundrise strives to provide your Form 1099 tax information as early and as accurately as possible. If Fundrise receives updated information for investments that you held during tax year 2021, we are required by the IRS to send you a CORRECTED Form 1099 with changes clearly highlighted. Please plan your tax preparation accordingly.

Enclosed: Important Official IRS Form(s) 1099

The report in this package contains your income tax return documents and year-end summary. Please retain this package for tax preparation purposes.

Although the Fundrise team seeks to provide timely and accurate information pertaining to the status of your investments, we cannot provide tax advice. While we do provide certain general tax information about the forms you may be receiving in our [Help Center](#), please consult with a qualified tax advisor, CPA, or financial planner for specific questions on your tax forms.



If you have any questions or need additional information about your Form(s) or year-end summary, please contact [investments@fundrise.com](mailto:investments@fundrise.com). We would be happy to help answer any questions you may have. Thank you for making another successful year possible for us to provide a simple, low-cost alternative for you to earn potentially better, more stable returns on your investments.

Best,  
The Fundrise Team  
11 Dupont Circle NW  
9th Floor  
Washington, D.C. 20036  
[investments@fundrise.com](mailto:investments@fundrise.com)

*Neither Fundrise nor any of its affiliates provide tax advice and do not represent in any manner that the outcomes described herein will result in any particular tax consequence. Investors should confer with their personal tax advisors regarding the tax consequences based on their particular circumstances.*

CORRECTED (if checked)

**Dividends and Distributions**

**Copy B  
For Recipient**

This is important tax information and is being furnished to the IRS. 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.

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. Fundrise Balanced eREIT LLC 11 Dupont Circle NW, 9th Floor Washington, DC 20036  Telephone Number: (202) 584-0550		<b>1a</b> Total ordinary dividends \$ 2.17	OMB No. 1545-0110  <b>2021</b>  Form <b>1099-DIV</b>
		<b>1b</b> Qualified dividends \$	
		<b>2a</b> Total capital gain distr. \$	<b>2b</b> Unrecap. Sec. 1250 gain \$
PAYER'S TIN  84-2015448	RECIPIENT'S TIN  XXX-XX-1837	<b>2c</b> Section 1202 gain \$	<b>2d</b> Collectibles (28%) gain \$
		<b>2e</b> Section 897 ordinary dividends \$	<b>2f</b> Section 897 capital gain \$
RECIPIENT'S name  Avinash Reddy Pothu		<b>3</b> Nondividend distributions \$ 8.70	<b>4</b> Federal income tax withheld \$
Street address (including apt. no.)  2767 Tribune Ave		<b>5</b> Section 199A dividends \$ 2.17	<b>6</b> Investment expenses \$
City or town, state or province, country, and ZIP or foreign postal code  Hayward, CA 94542		<b>7</b> Foreign tax paid \$	<b>8</b> Foreign country or U.S. possession
FATCA filing requirement <input type="checkbox"/>		<b>9</b> Cash liquidation distributions \$	<b>10</b> Noncash liquidation distributions \$
Account number (see instructions)  543130		<b>11</b> Exempt-interest dividends \$	<b>12</b> Specified private activity bond interest dividends \$
		<b>13</b> State	<b>14</b> State identification no. ----- \$
			<b>15</b> State tax withheld \$ ----- \$

Form **1099-DIV**

(keep for your records)

[www.irs.gov/Form1099DIV](http://www.irs.gov/Form1099DIV)

Department of the Treasury - Internal Revenue Service