Betterment

2021 SUPPLEMENTAL TAX FORM

As you prepare your taxes for 2021 , please note that not all of the information you need to prepare your tax return is available on your 1099 tax form. To make filing your taxes a bit more straightforward we designed this supplemental form to be comprehensive and easy-to-read. While you can't import this information directly into commercial tax software, we hope your life in the tax lane will be more enjoyable this year after reviewing this supplemental information.

For more helpful information on filing your taxes, check out our guide at betterment.com/taxtime

Let's take a collective deep breath and get started.

Foreign Sourced Income

The amount of foreign sourced income you have will help determine the amount of foreign tax credit for which you may be eligible.

The amount of foreign sourced income included in **Box 1a** of your 1099-DIV is $50.44
The amount of foreign sourced income included in **Box 1b** of your 1099-DIV is $34.85

U.S. Government Interest

The amount of U.S. government interest will help you determine which portion of your dividends may be state and local tax-free.

The amount of U.S. Government interest included in **Box 1a** of your 1099-DIV is $2.30

Municipal Interest

The breakdown of municipal interest will help you determine which portion of your dividends are taxable (out-of-state) versus tax-free (in-state).

The amount of in-state income included in **Box 11** of your 1099-DIV is $0.03
based on your resident state of **OH**. Your resident state also includes income from U.S. territories.

The amount of out-of-state income included in **Box 11** of your 1099-DIV is $2.60

Note: Your resident state for in-state income was determined by your address on record on December 31, 2021. If this is not accurate, you will need to calculate your in-state versus out-of-state interest using the below instructions or with the assistance of your tax advisor.

See instructions and additional information at https://www.betterment.com/help/tax-return-state-specific-municipal-bond-income