

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

# 2022 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 01566-1321 Payer's Name and Address: NATIONAL FINANCIAL SERVICES LLC 499 WASHINGTON BLVD JERSEY CITY, NJ 07310

Form 1099-DIV *	2022 Dividends and	d Distributions	Copy B for Recipient (OMB No. 1545-0110)
1a Total Ordinary Dividends	0.00	6 Investment Expenses	0.00
1b Qualified Dividends	0.00	7 Foreign Tax Paid	0.00
2a Total Capital Gain Distributions		8 Foreign Country or U.S. Possession	•••••
2b Unrecap. Sec 1250 Gain		9 Cash Liquidation Distributions	0.00
2c Section 1202 Gain		10 Non-Cash Liquidation Distributions	0.00
2d Collectibles (28%) Gain	0.00	12 Exempt Interest Dividends	0.00
2e Section 897 Ordinary Dividends		13 Specified Private Activity Bond Interest Dividends	0.00
2f Section 897 Capital Gain	0.00	14 State	•••••
3 Nondividend Distributions	0.00	15 State Identification No.	
4 Federal Income Tax Withheld	0.00	16 State Tax Withheld	
5 Section 1994 Dividends	0.00		

Form 1099-INT *	2022 Interest I	ncome	Copy B for Recipient (OMB No. 1545-0112)
1 Interest Income	8.13	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. Obligati	ions0.00	12 Bond Premium on U.S. Treasury Obligations	0.00
4 Federal Income Tax Withheld	0.00	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	
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.

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RAJESH IVER

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

Form 1099-MISC *	2022 Miscellaneous	s Information	Copy B for Recipient (OMB No. 1545-0115)
2 Royalties	0.00	16 State Tax Withheld	0.00
3 Other Income	0.00	17 State/Payer's State No	
4 Federal Income Tax Withheld	0.00	18 State Income	
8. Substitute Payments in Lieu of Dividends or Interest	0.00		

Summary of 2022 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	5,162.63	0.00	0.00	0.00	5,162.63	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
	5,162.63	0.00	0.00	0.00	5,162.63	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 2022 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.			

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RAJESH IYER

Account No. **205-34/50/** Cus

**Z05-347507** Customer Service: 800-544-66

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

#### FORM 1099-B\*

### 2022 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)

1a Description o	f property, Stock of	or Other Sy	mbol, CUSIP							
Action	Quantity 1	<b>1b</b> Date Acquired	<b>1c</b> Date Sold or Disposed	1d Proceeds	<b>1e</b> Cost or Other Basis (b)	<b>1f</b> Accrued Market Discount	1g Wash Sale Loss Disallowed	Gain/Loss (-)	4 Federal Income Tax Withheld	14 State 16 State Tax Withheld
WAYFAIR INC, V	V, 94419L101									
Sale	12.000	02/01/22	02/02/22	1,857.66	0.00(e)			1,857.66		
Sale	12.000	05/01/22	2 05/03/22	1,048.94	0.00(e)			1,048.94		
Sale	11.000	08/01/22	2 08/02/22	629.20	0.00(e)			629.20		
Sale	15.000	11/01/22	11/02/22	566.11	0.00(e)			566.11		
Sale	11.000	11/01/22	11/02/22	415.15	0.00(e)			415.15		
Sale	16.000	12/01/22	2 12/02/22	645.57	0.00(e)			645.57		
Subtotals				5,162.63	0.00					
TOTALS				5,162.63	0.00	0.00	0.00		0.00	
		Box B S	hort-Term Realize	d Gain				5,162.63		
		Box B S	hort-Term Realize	d Loss				0.00		

For any transaction listed on Form 1099-B in a section indicating that "basis <u>is reported</u> 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 <u>is not reported</u> 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, 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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SHIYER Account No. **Z05-3475** 

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

FORM 1099-B\*

### 2022 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

(e) 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.

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RAJESH IYEF

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

Summary of 2022 St	upplemental Info	rmation Not Reported to the IRS	
Margin Interest Paid  Tax Exempt Investment Expense		Currency Realized Gain/Loss (USD)	
Accrued Interest Paid on Purchases	0.00	Addition to Basis	0.00
Proceeds Investment Expenses Severance Tax	0.00	Account Fees	0.00
Administrative Expenses	0.00	Money Market Realized Gain/Loss	0.00
Deductible Generic Expenses	0.00	Mortgage Pool Statement (MBS)	0.00

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# 2022 SUPPLEMENTAL INFORMATION

RAJESH IYER

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

**Z05-347507** Customer Service:

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, Syr	mbol, CUSIP					
Date	1 Interest Income	<b>6</b> Foreign Tax Paid	11 Bond Premium	Noncovered Bond Premium	10 Market Discount	Noncovered Market Discount
CASH, FCASH,	315994103					
01/31/22	0.01					
02/28/22	0.01					
03/31/22	0.01					
04/29/22	0.01					
05/31/22	0.13					
06/30/22	0.33					
07/29/22	0.64					
08/31/22	1.04					
09/30/22	1.10					
10/31/22	1.38					
11/30/22	1.43					
12/30/22	2.04					
Subtotals	8.13					
TOTALS	8.13	0.00	0.00	0.00	0.00	0.00



### 2022 SUPPLEMENTAL INFORMATION

**RAJESH IYER** 

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#### **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	12.000	02/01/22	02/02/22	1,857.66	1,950.60	1,950.60	0.00	-92.94
RSU	12.000	05/01/22	05/03/22	1,048.94	1,048.68	1,048.68	0.00	0.26
RSU	11.000	08/01/22	08/02/22	629.20	625.02	625.02	0.00	4.18
RSU	15.000	11/01/22	11/02/22	566.11	567.30	567.30	1.19	-1.19
RSU	11.000	11/01/22	11/02/22	415.15	416.02	416.89	1.74	-1.74
RSU	16.000	12/01/22	12/02/22	645.57	666.08	666.08	20.51	-20.51
		Totals	s	5,162.63 hort-Term Adjusted	d Realized Gain	5,274.57		4.44
			S	hort-Term Adjusted	d Realized Loss			-116.38
			V	Vash Sale Loss Disa	allowed		23.44	

(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

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# 2022 SUPPLEMENTAL INFORMATION

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

Z05-347507 Customer Service:

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.



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