

BALA GANGADHAR REDDY CHINTALA  
17833 ALTHEA BLUE PL  
LUTZ FL 33558-6104

**Your 2022 Consolidated 1099 Tax Statement**

Page 1 of 4

**FIGURES ARE FINAL****Recipient's Name:**

BALA GANGADHAR REDDY CHINTALA

Information as of February 05, 2023

**Account Holder(s)**

BALA GANGADHAR REDDY CHINTALA

**Payer's Identification Number:**

43-1591643

**Financial Advisor:**

ANDY HODGES (314) 515-3109

**Edward Jones Account Number:**

235-37159-1-1

**Online Resources**

Visit [www.edwardjones.com/taxcenter](http://www.edwardjones.com/taxcenter) for guides, tax reporting information and answers to common questions.

**Online Access Features**

- View, print and download your tax forms any time after they are generated.
- Share your tax forms securely with your tax professional from the Documents screen. To get started, select the forms to share and click "Share with Third Party".
- Import your Consolidated 1099 and Form 1099-R tax data into Turbo Tax®, H&R Block at Home™ or other tax preparation software.  
Visit [www.edwardjones.com/access](http://www.edwardjones.com/access) to learn more about these services. Restrictions may apply.

**Ask Your Branch to Share Your Tax Forms Securely**

At your request, your Edward Jones branch team can share your tax forms securely with your tax professional.

**Turbo Tax® or other Tax Preparation Software**

You can import your Edward Jones tax information from within Turbo Tax® or H&R Block at Home™ using the

software's import feature. Instructions for manually entering certain items of supplemental information are available at [www.edwardjones.com/turbotax](http://www.edwardjones.com/turbotax). Download options for other tax preparation software also are available via Online Access. Edward Jones does not provide support for tax preparation software. Please contact the software provider for assistance.

**Official Tax Document - What Is My Income?**

The 1099 forms included in this document are the official records of income reported to the IRS and should be used to prepare your tax return. Information provided in the supplemental sections is not sent to the IRS. This document may not match your December statement due to reclassifications of income occurring after year end.

**Additional Tax Information**

An Additional Tax Information section may be included in this document. It provides information about potential adjustments to income on your state tax return and the amount of foreign source income received.

**Separate Consolidated Statements for Each Account**

This document includes information only for the Edward Jones account number listed above.

**Investment Advisory Program Fees**

If you paid account management fees to Edward Jones in 2022, you may be able to deduct those fees from income on your state income tax return. The amount of fees you paid is not included with this document. These fees are included in your fees total noted on your December statement. Please consult your tax professional.

**Notice of De Minimis Safe Harbor for Revised Forms**

If there is an incorrect dollar amount on your tax form, Edward Jones is not required to correct it if the error differs from the correct amount by no more than \$100 (or \$25 in the case of tax withheld). You may elect to receive all corrected forms regardless of the dollar amount by calling us at 1-800-282-0829.

**Notice of Tax Information for California Residents**

Edward Jones is required to report to California residents income earned on non-California state bonds and proceeds from broker exchange transactions reported on Form 1099-B. If you are a resident of California and received either of these types of income during 2022, we report this information to you, the IRS and the California Franchise Tax Board.

**Questions?**

- Preparing your tax return: Contact your tax professional, call the IRS at 800-829-1040 or visit the IRS website ([www.irs.gov](http://www.irs.gov)). Edward Jones does not provide tax advice.
- Using Turbo Tax® or H&R Block at Home™ software: Contact Turbo Tax® or H&R Block at Home™ customer support. Edward Jones does not provide support for tax preparation software.
- Understanding this tax document: Call Edward Jones at 800-282-0829. Associates are available (Central time):  
Tax Season, (Jan. 30 - April 18): Monday - Friday, 7 a.m. to 7 p.m. and Saturdays, (Feb. 11 - April 15), 9 a.m. to 2 p.m.  
Outside Tax Season: Monday - Friday, 8 a.m. to 6 p.m.

**The information reported on your Consolidated 1099 Tax Statement is reported to you and the IRS. Please retain for your records. Edward Jones, its employees and financial advisors cannot provide tax or legal advice. You should consult your attorney or qualified tax advisor regarding your situation.**

**2022 CONSOLIDATED 1099 STATEMENT**

**Recipient's Name:**  
BALA GANGADHAR REDDY CHINTALA

(Includes 1099-INT, 1099-DIV)

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**FIGURES ARE FINAL**

Information as of February 05, 2023

**Edward Jones Account Number:**  
235-37159-1-1

**Payer's Identification Number:**  
43-1591643

**Recipient's Identification Number:**  
\*\*\*-\*\*-8458

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). 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.

<b>1099-INT Interest Income - 2022 Statement for recipient</b>	(Copy B) (OMB NO. 1545-0112)	<b>1099-DIV Dividends and Distributions - 2022 Statement for recipient</b>	(Copy B)(OMB NO. 1545-0110)
Box 1 Interest Income	9.34	Box 1a Total Ordinary Dividends	2,795.78
Box 2 Early Withdrawal Penalty	0.00	Box 1b Qualified Dividends	2,567.65
Box 3 Interest on U.S. Savings Bonds and Treasury Obligations	0.00	Box 2a Total Capital Gain Distributions	0.00
<b>Box 4 Federal Income Tax Withheld</b>	<b>0.00</b>	Box 2b Unrecap. Sec. 1250 Gain	0.00
Box 5 Investment Expenses	0.00	Box 2c Section 1202 Gain	0.00
Box 6 Foreign Tax Paid	0.00	Box 2d Collectibles (28%) Gain	0.00
Box 7 Foreign country or U.S. possession		Box 2e Section 897 ordinary dividends	0.00
Box 8 Tax-Exempt Interest	0.00	Box 2f Section 897 capital gain	0.00
Box 9 Specified Private Activity Bond Interest	0.00	Box 3 Nondividend Distributions	176.87
Box 10 Market Discount	0.00	<b>Box 4 Federal Income Tax Withheld</b>	<b>0.00</b>
Box 11 Bond Premium	0.00	Box 5 Section 199A Dividends	228.13
Box 12 Bond Premium on Treasury Obligations	0.00	Box 6 Investment Expenses	0.00
Box 13 Bond Premium on Tax-Exempt Bond	0.00	Box 7 Foreign Tax Paid	0.00
Box 14 Tax-Exempt and Tax Credit Bond CUSIP no.		Box 8 Foreign Country or U.S.Possession	
		Box 9 Cash Liquidation Distributions	0.00
		Box 10 Noncash Liquidation Distributions	0.00
		Box 12 Exempt-Interest Dividends	0.00
		Box 13 Specified Private Activity Bond Interest Dividends	0.00

**SUMMARY OF INVESTMENT INCOME****Recipient's Name:**

BALA GANGADHAR REDDY CHINTALA

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**FIGURES ARE FINAL**

Information as of February 05, 2023

**Edward Jones Account Number:**

235-37159-1-1

**Payer's Identification Number:**

43-1591643

**This is not a Form 1099.** It is a summary of the income you received in your account during 2022. For a complete description of each activity, refer to your account statement for that period. If you have any questions, contact your Edward Jones financial advisor.

2022 Date	Description	CUSIP	Amount in 2022
<b>Interest Income - Taxable</b>			
10/21	INTEREST ON CREDIT BALANCE	006990105	0.33
11/21	INTEREST ON CREDIT BALANCE	006990105	3.16
12/30	INTEREST ON CREDIT BALANCE	006990105	5.85
<b>Total Taxable Interest (BOX 1 1099-INT)</b>			<b>9.34</b>

2022 Date	Description	CUSIP	Amount in 2022
<b>Dividend Income - Taxable</b>			
05/31	COGNIZANT TECH SOLUTIONS CORP	192446102	621.00
08/30	COGNIZANT TECH SOLUTIONS CORP	192446102	623.32
11/29	COGNIZANT TECH SOLUTIONS CORP	192446102	625.83
07/27	INVESCO MTG CAP INC	46131B704	405.00
10/27	INVESCO MTG CAP INC	46131B704	292.50
<b>Total Qualified Dividends (Box 1b 1099-DIV)</b>			<b>2,567.65</b>

04/27	INVESCO MTG CAP INC	46131B100	405.00
04/27	INVESCO MTG CAP INC	46131B100	-228.13
04/27	INVESCO MTG CAP INC	46131B100	-176.87
<b>Total Nonqualified Dividends</b>			<b>0.00</b>

**Total Ordinary Dividends (Box 1a on Form 1099-DIV):** **2,795.78**

04/27	INVESCO MTG CAP INC	46131B100	176.87
<b>Total Nondividend Distributions (BOX 3 1099-DIV)</b>			<b>176.87</b>

2022 Date	Description	CUSIP	Amount in 2022
<b>Dividend Income - Taxable (continued)</b>			
04/27	INVESCO MTG CAP INC	46131B100	228.13
<b>Total Section 199A Dividends</b>			<b>228.13</b>

**SUMMARY OF INVESTMENT INCOME**

**Recipient's Name:**  
BALA GANGADHAR REDDY CHINTALA

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**FIGURES ARE FINAL**

Information as of February 05, 2023

**Edward Jones Account Number:**  
235-37159-1-1

**Payer's Identification Number:**  
43-1591643

Thank you for doing business with Edward Jones. This is the end of your 2022 tax reporting information. If you have any questions concerning any matter, especially errors or omissions, contact your branch team at 314-515-3109 immediately or contact us at 1-800-282-0829.

201 Progress Parkway  
Maryland Heights, MO 63043-3042

## Instructions to Recipients

**Recipient's taxpayer identification number - (TIN).** For your protection, this form may show only the last four digits of your TIN (social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN)). However, the issuer has reported your complete TIN to the IRS.

**FATCA filing requirement.** If the FATCA filing requirement box is checked, the payer is reporting on this Form 1099 to satisfy its chapter 4 account reporting requirement. You also may have a filing requirement. See the instructions for Form 8938.

**Account number.** May show an account or other unique number the payer assigned to distinguish your account.

Please visit [www.irs.gov](http://www.irs.gov) for the most complete and current forms, instructions and other information.

### Form 1099-INT

The information provided may be different for covered and noncovered securities. For a description of covered securities, see the Instructions for Form 8949. For a taxable covered security acquired at a premium, unless you notified the payer in writing in accordance with Regulations section 1.6045-1(n)(5) that you did not want to amortize the premium under section 171, or for a tax-exempt covered security acquired at a premium, your payer must generally report either (1) a net amount of interest that reflects the offset of the amount of interest paid to you by the amount of premium amortization allocable to the payment(s), or (2) a gross amount for both the interest paid to you and the premium amortization allocable to the payment(s). If you did notify your payer that you did not want to amortize the premium on a taxable covered security, then your payer will only report the gross amount of interest paid to you. For a noncovered security acquired at a premium, your payer is only required to report the gross amount of interest paid to you.

**Box 1.** Shows taxable interest paid to you during the calendar year by the payer. This does not include interest shown in box 3. May also show the total amount of the credits from clean renewable energy bonds, new clean renewable energy bonds, qualified energy conservation bonds, qualified zone academy bonds, qualified school construction bonds, and build America bonds that must be included in your interest income. These amounts were treated as paid to you during the calendar year on the credit allowance dates (March 15, June 15, September 15, and December 15). For more information, see Form 8912. See the instructions above for a taxable covered security acquired at a premium.

**Box 2.** Shows interest or principal forfeited because of early withdrawal of time savings. You may deduct this amount to figure your adjusted gross income on your income tax return. See the Instructions for Form 1040 to see where to take the deduction.

**Box 3.** Shows interest on U.S. Savings Bonds, Treasury bills, Treasury bonds, and Treasury notes. This may or may not all be taxable. See Pub. 550. This interest is exempt from state and local income taxes. This interest is not included in box 1. See the instructions above for a taxable covered security acquired at a premium.

**Box 4.** Shows backup withholding. Generally, a payer must backup withhold if you did not furnish your TIN or you did not furnish the correct TIN to the payer. See Form W-9. Include this amount on your income tax return as tax withheld.

**Box 5.** Any amount shown is your share of investment expenses of a single-class REMIC. This amount is included in box 1. **Note:** This amount is not deductible.

**Box 6.** Shows foreign tax paid. You may be able to claim this tax as a deduction or a credit on your Form 1040 or 1040-SR. See your tax return instructions.

**Box 7.** Shows the country or U.S. possession to which the foreign tax was paid.

**Box 8.** Shows tax-exempt interest paid to you during the calendar year by the payer. See how to report this amount in the Instructions for Form 1040. This amount may be subject to backup withholding. See Box 4 above. See the instructions above for a tax-exempt covered security acquired at a premium.

**Box 9.** Shows tax-exempt interest subject to the alternative minimum tax. This amount is included in box 8. See the Instructions for Form 6251. See the instructions above for a tax-exempt covered security acquired at a premium.

**Box 10.** For a taxable or tax-exempt covered security, if you made an election under section 1278(b) to include market discount in income as it accrues and you notified your payer of the election in writing in accordance with Regulations section 1.6045-1(n)(5), shows the market discount that accrued on the debt instrument during the year while held by you, unless it was reported on Form 1099-OID. For a taxable or tax-exempt covered security acquired on or after January 1, 2015, accrued market discount will be calculated on a constant yield basis unless you notified your payer in writing in accordance with Regulations section 1.6045-1(n)(5) that you did not want to make a constant yield election for market discount under section 1276(b). Report the accrued market discount on your income tax return as directed in the Instructions for Form 1040. Market discount on a tax-exempt security is includible in taxable income as interest income.

**Box 11.** For a taxable covered security (other than a U.S. Treasury obligation), shows the amount of premium amortization allocable to the interest payment(s), unless you notified the payer in writing in accordance with Regulations section 1.6045-1(n)(5) that you did not want to amortize bond premium under section 171. If an amount is reported in this box, see the Instructions for Schedule B (Form 1040) to determine the net amount of interest includible in income on Form 1040 or 1040-SR with respect to the security. If an amount is not reported in this box for a taxable covered security acquired at a premium and the payer is reporting premium amortization, the payer has reported a net amount of interest in box 1. If the amount in box 11 is greater than the amount of interest paid on the covered security, see Regulations section 1.171-2(a)(4).

**Box 12.** For a U.S. Treasury obligation that is a covered security, shows the amount of premium amortization allocable to the interest payment(s), unless you notified the payer in writing in

accordance with Regulations section 1.6045-1(n)(5) that you did not want to amortize bond premium under section 171. If an amount is reported in this box, see the Instructions for Schedule B (Form 1040) to determine the net amount of interest includible in income on Form 1040 or 1040-SR with respect to the U.S. Treasury obligation. If an amount is not reported in this box for a U.S. Treasury obligation that is a covered security acquired at a premium and the payer is reporting premium amortization, the payer has reported a net amount of interest in box 3. If the amount in box 12 is greater than the amount of interest paid on the U.S. Treasury obligation, see Regulations section 1.171-2(a)(4).

**Box 13.** For a tax-exempt covered security, shows the amount of premium amortization allocable to the interest payment(s). If an amount is reported in this box, see Pub. 550 to determine the net amount of tax-exempt interest reportable on Form 1040 or 1040-SR. If an amount is not reported in this box for a tax-exempt covered security acquired at a premium, the payer has reported a net amount of interest in box 8 or 9, whichever is applicable. If the amount in box 13 is greater than the amount of interest paid on the tax-exempt covered security, the excess is a nondeductible loss. See Regulations section 1.171-2(a)(4)(ii).

**Box 14.** Shows CUSIP number(s) for tax-exempt bond(s) on which tax-exempt interest was paid, or tax credit bond(s) on which taxable interest was paid or tax credit was allowed, to you during the calendar year. If blank, no CUSIP number was issued for the bond(s).

**Boxes 15-17.** State tax withheld reporting boxes.

**Nominees.** If this form includes amounts belonging to another person(s), you are considered a nominee recipient. Complete a Form 1099-INT for each of the other owners showing the income allocable to each. File Copy A of the form with the IRS. Furnish Copy B to each owner. List yourself as the "payer" and the other owner(s) as the "recipient." File Form(s) 1099-INT with Form 1096 with the Internal Revenue Service Center for your area. On Form 1096 list yourself as the "filer". A spouse is not required to file a nominee return to show amounts owned by the other spouse.

**Future developments.** For the latest information about developments related to Form 1099-INT and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/Form1099INT](http://www.irs.gov/Form1099INT).

**FreeFile.** Go to [www.irs.gov/FreeFile](http://www.irs.gov/FreeFile) to see if you qualify for no-cost online federal tax preparation, e-filing, and direct deposit or payment options.

### Form 1099-DIV

**Box 1a.** Shows total ordinary dividends that are taxable. Include

201 Progress Parkway  
Maryland Heights, MO 63043-3042

this amount on the "Ordinary dividends" line of Form 1040 or 1040-SR. Also, report it on Schedule B (Form 1040), if required.

**Box 1b.** Shows the portion of the amount in box 1a that may be eligible for reduced capital gains rates. See the Instructions for Form 1040 for how to determine this amount and where to report.

The amount shown may be dividends a corporation paid directly to you as a participant (or beneficiary of a participant) in an employee stock ownership plan (ESOP). Report it as a dividend on your Form 1040 or 1040-SR but treat it as a plan distribution, not as investment income, for any other purpose.

**Box 2a.** Shows total capital gain distributions from a regulated investment company (RIC) or real estate investment trust (REIT). See How To Report in the Instructions for Schedule D (Form 1040). But, if no amount is shown in boxes 2b, 2c, 2d and 2f and your only capital gains and losses are capital gain distributions, you may be able to report the amounts shown in box 2a on your Form 1040 or 1040-SR rather than Schedule D. See the Instructions for Form 1040

**Box 2b.** Shows the portion of the amount in box 2a that is unrecaptured section 1250 gain from certain depreciable real property. See the Unrecaptured Section 1250 Gain Worksheet in the Instructions for Schedule D (Form 1040).

**Box 2c.** Shows the portion of the amount in box 2a that is section 1202 gain from certain small business stock that may be subject to an exclusion. See the Schedule D (Form 1040) instructions.

**Box 2d.** Shows the portion of the amount in box 2a that is 28% rate gain from sales or exchanges of collectibles. If required, use this amount when completing the 28% Rate Gain Worksheet in the Instructions for Schedule D (Form 1040).

**Box 2e.** Shows the portion of the amount in box 1a that is section 897 gain attributable to disposition of U.S. real property interests (USRPI).

**Box 2f.** Shows the portion of the amount in box 2a that is section 897 gain attributable to disposition of USRPI.

**Note:** Boxes 2e and 2f apply only to foreign persons and entities whose income maintains its character when passed through or distributed to its direct or indirect foreign owners or beneficiaries. It is generally treated as effectively connected to a trade or business within the United States. See the instructions for your tax return.

**Box 3.** Shows a return of capital. To the extent of your cost (or other basis) in the stock, the distribution reduces your basis and is not taxable. Any amount received in excess of your basis is taxable to you as capital gain. See Pub. 550.

**Box 4.** Shows backup withholding. A payer must backup withhold on certain payments if you did not give your TIN to the payer. See Form W-9, for information on backup withholding. Include this amount on your income tax return as tax withheld.

**Box 5.** Shows the portion of the amount in box 1a that may be eligible for the 20% qualified business income deduction under section 199A. See the instructions for Form 8995 and Form 8995-A.

**Box 6.** Shows your share of expenses of a nonpublicly offered RIC, generally a nonpublicly offered mutual fund. This amount is included in box 1a.

**Box 7.** Shows the foreign tax that you may be able to claim as a deduction or a credit on Form 1040 or 1040-SR. See the Instructions for Form 1040.

**Box 8.** This box should be left blank if a RIC reported the foreign tax shown in box 7.

**Boxes 9 and 10.** Show cash and noncash liquidation distributions.

**Box 11.** If the FATCA filing requirement box is checked, the payer is reporting on this Form 1099 to satisfy its account reporting requirement under chapter 4 of the Internal Revenue Code. You may also have a filing requirement. See the Instructions for Form 8938.

**Box 12.** Shows exempt-interest dividends from a mutual fund or other RIC paid to you during the calendar year. See the Instructions for Form 1040 for where to report. This amount may be subject to backup withholding. See Box 4 above.

**Box 13.** Shows exempt-interest dividends subject to the alternative minimum tax. This amount is included in box 12. See the Instructions for Form 6251

**Boxes 14–16.** State income tax withheld reporting boxes.

**Nominees.** If this form includes amounts belonging to another person, you are considered a nominee recipient. You must file Form 1099-DIV (with a Form 1096) with the IRS for each of the other owners to show their share of the income, and you must furnish a Form 1099-DIV to each. A spouse is not required to file a nominee return to show amounts owned by the other spouse. See the current General Instructions for Certain Information Returns.

**Future developments.** For the latest information about developments related to Form 1099-DIV and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/Form1099DIV](http://www.irs.gov/Form1099DIV).