



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

# 2022 TAX REPORTING STATEMENT

AKSHAT VERMA

Account No. **Z08-503322** Customer Service: 800-544-6666  
Recipient ID No. **\*\*\*-\*\*-8638** Payer's Fed ID Number: 04-3523567

eDelivered

AKSHAT VERMA  
1301 CROSSING PL APT 711  
AUSTIN TX 78741-2037

Payer's Name and Address:  
NATIONAL FINANCIAL SERVICES LLC  
499 WASHINGTON BLVD  
JERSEY CITY, NJ 07310

**Form 1099-DIV \*** **2022 Dividends and Distributions** Copy B for Recipient  
(OMB No. 1545-0110)

1a Total Ordinary Dividends .....	103.42	6 Investment Expenses .....	0.00
1b Qualified Dividends .....	98.62	7 Foreign Tax Paid.....	0.00
2a Total Capital Gain Distributions .....	0.00	8 Foreign Country or U.S. Possession.....	0.00
2b Unrecap. Sec 1250 Gain.....	0.00	9 Cash Liquidation Distributions.....	0.00
2c Section 1202 Gain.....	0.00	10 Non-Cash Liquidation Distributions.....	0.00
2d Collectibles (28%) Gain.....	0.00	12 Exempt Interest Dividends.....	0.00
2e Section 897 Ordinary Dividends .....	0.00	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. ....	
<b>4 Federal Income Tax Withheld .....</b>	<b>0.00</b>	16 State Tax Withheld.....	0.00
5 Section 199A Dividends .....	4.80		

**Form 1099-INT \*** **2022 Interest Income** Copy B for Recipient  
(OMB No. 1545-0112)

1 Interest Income .....	0.00	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
<b>4 Federal Income Tax Withheld .....</b>	<b>0.00</b>	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 .....	0.00	17 State Tax Withheld .....	0.00
9 Specified Private Activity Bond Interest .....	0.00		

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## Form 1099-MISC \*

## 2022 Miscellaneous 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. ....	
<b>4 Federal Income Tax Withheld .....</b>	<b>0.00</b>	18 State Income .....	0.00
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 <u>reported</u> to the IRS	17,859.05	24,477.69	0.00	186.93	-6,618.64	0.00
Short-term transactions for which basis is <u>not reported</u> to the IRS	0.00	0.00	0.00	0.00	0.00	0.00
Long-term transactions for which basis is <u>reported</u> to the IRS	4,165.41	9,569.35	0.00	0.00	-5,403.94	0.00
Long-term transactions for which basis is <u>not reported</u> 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
	22,024.46	34,047.04	0.00	186.93	-12,022.58	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 .....	0.00	Total Original Issue Discount - REMIC .....	0.00
Total Original Issue Discount on U.S. Treasury Obligations .....	0.00		
Total Original Issue Discount on Tax-Exempt Obligations .....	0.00		

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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**FORM 1099-B\***

## 2022 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

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(IRS Form 1099-B box numbers are shown below in **bold** type)

1a Description of property, Stock or Other Symbol, CUSIP	Quantity	1b Date Acquired	1c Date Sold or Disposed	1d Proceeds	1e Cost or Other Basis (b)	1f Accrued Market Discount	1g Wash Sale Loss Disallowed	Gain/Loss (-)	4 Federal Income Tax Withheld	14 State Tax Withheld
ADVANCED MICRO DEVICES INC, AMD, 007903107										
Sale	5.000	04/06/22	12/30/22	323.47	518.98			-195.51		
AIRBNB INC COM CL A, ABNB, 009066101										
Sale	1.000	03/08/22	12/30/22	85.43	136.12			-50.69		
AMAZON.COM INC, AMZN, 023135106										
Sale	15.080	03/08/22	10/14/22	1,609.34	2,038.60			-429.26		
Sale	20.000	03/08/22	10/14/22	2,134.40	2,743.09			-608.69		
Sale	5.000	04/06/22	10/14/22	533.61	792.60			-258.99		
Sale	0.300	04/29/22	12/28/22	24.65	37.25			-12.60		
Sale	3.700	04/29/22	12/28/22	296.57	459.47			-162.90		
Sale	10.000	05/05/22	12/28/22	801.53	1,160.86			-359.33		
Sale	2.300	05/10/22	12/28/22	184.35	247.89			-63.54		
<b>Subtotals</b>				<b>5,584.45</b>	<b>7,479.76</b>					
BLOCK INC CL A, SQ, 852234103										
Sale	5.000	04/06/22	12/30/22	315.24	634.05			-318.81		
COINBASE GLOBAL INC COM CL A, COIN, 19260Q107										
Sale	3.000	04/08/22	12/30/22	106.09	484.17			-378.08		
CROWDSTRIKE HLDGS INC CL A, CRWD, 22788C105										
Sale	3.000	03/14/22	12/30/22	315.62	547.71			-232.09		
Sale	2.000	05/09/22	12/30/22	210.41	298.30			-87.89		
<b>Subtotals</b>				<b>526.03</b>	<b>846.01</b>					

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Recipient ID No. **\*\*\*-\*\*-8638** 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 reported to the IRS** --report on Form 8949 with Box A checked and/or Schedule D, Part I  
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1a Description of property, Stock or Other Symbol, CUSIP	Quantity	1b Date Acquired	1c Date Sold or Disposed	1d Proceeds	1e Cost or Other Basis (b)	1f Accrued Market Discount	1g Wash Sale Loss Disallowed	Gain/Loss (-)	4 Federal Income Tax Withheld	14 State Tax Withheld
DOORDASH INC CL A, DASH, 25809K105										
Sale	2.000	03/08/22	12/30/22	97.67	163.09			-65.42		
FIDELITY 500 INDEX FUND, FXAIX, 315911750										
Sale	26.720	01/18/22	06/22/22	3,500.00	4,225.33		4.70	-725.33		
Sale	18.000	01/18/22	12/30/22	2,396.16	2,841.83		182.23	-445.67		
<b>Subtotals</b>				<b>5,896.16</b>	<b>7,067.16</b>		<b>186.93</b>			
META PLATFORMS INC CLASS A COMMON STOCK, META, 30303M102										
Sale	5.000	03/08/22	12/30/22	600.71	950.18			-349.47		
NETFLIX INC, NFLX, 64110L106										
Sale	1.000	03/08/22	12/28/22	275.71	346.55			-70.84		
Sale	5.000	04/20/22	12/28/22	1,378.56	1,104.85			273.71		
Sale	1.000	05/05/22	12/28/22	275.72	188.08			87.64		
<b>Subtotals</b>				<b>1,929.99</b>	<b>1,639.48</b>					
NVIDIA CORPORATION COM, NVDA, 67066G104										
Sale	3.000	04/08/22	12/28/22	418.98	697.98			-279.00		
Sale	2.000	04/14/22	12/28/22	279.32	428.30			-148.98		
<b>Subtotals</b>				<b>698.30</b>	<b>1,126.28</b>					
PAYPAL HLDGS INC COM, PYPL, 70450Y103										
Sale	2.000	03/08/22	12/30/22	142.26	187.76			-45.50		

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FORM 1099-B\*

## 2022 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

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SHOPIFY INC COM NPV CL A ISIN #CA82509L1, SHOP, 82509L107										
Sale	10.000	03/08/22	12/28/22	320.60	529.89			-209.29		
Sale	5.000	04/08/22	12/28/22	160.30	304.86			-144.56		
Sale	10.000	04/20/22	12/28/22	320.60	556.25			-235.65		
Sale	5.440	05/05/22	12/28/22	174.41	224.66			-50.25		
Sale	0.560	05/05/22	12/28/22	18.40	23.13			-4.73		
<b>Subtotals</b>				<b>994.31</b>	<b>1,638.79</b>					
-----										
TESLA INC COM, TSLA, 88160R101										
Sale	2.233	03/08/22	12/30/22	274.90	601.79			-326.89		
-----										
TWILIO INC CL A, TWLO, 90138F102										
Sale	2.000	03/08/22	12/30/22	97.76	278.32			-180.56		
Sale	3.000	04/06/22	12/30/22	146.63	458.34			-311.71		
<b>Subtotals</b>				<b>244.39</b>	<b>736.66</b>					
-----										
UPSTART HLDGS INC COM, UPST, 91680M107										
Sale	2.450	03/14/22	12/30/22	32.39	218.38			-185.99		
Sale	0.550	03/14/22	12/30/22	7.26	49.03			-41.77		
<b>Subtotals</b>				<b>39.65</b>	<b>267.41</b>					
-----										
<b>TOTALS</b>				<b>17,859.05</b>	<b>24,477.69</b>	<b>0.00</b>	<b>186.93</b>		<b>0.00</b>	
								<b>361.35</b>		
								<b>-6,979.99</b>		

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FORM 1099-B\*

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AIRBNB INC COM CL A, ABNB, 009066101										
Sale	1.000	02/04/21	12/30/22	85.45	195.63			-110.18		
Sale	1.000	03/18/21	12/30/22	85.45	195.33			-109.88		
Sale	1.000	03/18/21	12/30/22	85.45	195.21			-109.76		
<b>Subtotals</b>				<b>256.35</b>	<b>586.17</b>					
AMAZON.COM INC, AMZN, 023135106										
Sale	4.920	08/02/21	10/14/22	525.06	818.67			-293.61		
COINBASE GLOBAL INC COM CL A, COIN, 19260Q107										
Sale	1.000	11/11/21	12/30/22	35.36	327.01			-291.65		
CROWDSTRIKE HLDGS INC CL A, CRWD, 22788C105										
Sale	0.300	02/11/21	12/30/22	31.56	71.75			-40.19		
Sale	0.700	02/23/21	12/30/22	73.65	151.68			-78.03		
Sale	1.000	11/01/21	12/30/22	105.21	275.12			-169.91		
<b>Subtotals</b>				<b>210.42</b>	<b>498.55</b>					
DISNEY WALT CO COM, DIS, 254687106										
Sale	1.000	02/09/21	12/30/22	86.83	187.20			-100.37		
Sale	2.000	03/18/21	12/30/22	173.66	385.72			-212.06		
<b>Subtotals</b>				<b>260.49</b>	<b>572.92</b>					
DOCUSIGN INC COM, DOCU, 256163106										
Sale	0.553	01/29/21	12/30/22	30.47	136.16			-105.69		
Sale	0.447	02/04/21	12/30/22	24.63	108.31			-83.68		

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**FORM 1099-B\***

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DOCUSIGN INC COM, DOCU, 256163106										
Sale	1.000	11/01/21	12/30/22	55.10	278.52			-223.42		
<b>Subtotals</b>				<b>110.20</b>	<b>522.99</b>					
DOORDASH INC CL A, DASH, 25809K105										
Sale	1.000	03/15/21	12/30/22	48.83	139.86			-91.03		
Sale	1.000	11/09/21	12/30/22	48.83	192.62			-143.79		
<b>Subtotals</b>				<b>97.66</b>	<b>332.48</b>					
IDEXX LABORATORIES INC COM USD0.10, IDXX, 45168D104										
Sale	0.018	02/22/21	12/30/22	7.33	9.75			-2.42		
Sale	0.191	02/23/21	12/30/22	77.81	99.50			-21.69		
Sale	0.225	02/23/21	12/30/22	91.66	117.73			-26.07		
Sale	0.500	03/18/21	12/30/22	203.68	244.78			-41.10		
<b>Subtotals</b>				<b>380.48</b>	<b>471.76</b>					
INNOVIZ TECHNOLOGIESLTD SHS ISIN #IL0011, INVZ, M5R635108										
Sale	1.000	02/09/21	12/30/22	3.89	13.12			-9.23		
LEMONADE INC COM, LMND, 52567D107										
Sale	0.500	03/02/21	12/30/22	6.78	57.91			-51.13		
Sale	0.500	03/02/21	12/30/22	6.78	56.75			-49.97		
Sale	0.500	03/02/21	12/30/22	6.77	56.75			-49.98		
Sale	0.431	03/05/21	12/30/22	5.84	39.95			-34.11		
<b>Subtotals</b>				<b>26.17</b>	<b>211.36</b>					

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LUCID GROUP INC COM, LCID, 549498103										
Sale	2.000	03/02/21	12/30/22	13.54	59.34			-45.80		
LUMINAR TECHNOLOGIESINC COM CL A, LAZR, 550424105										
Sale	1.000	02/09/21	12/30/22	4.89	32.10			-27.21		
Sale	2.000	03/01/21	12/30/22	9.78	57.86			-48.08		
<b>Subtotals</b>				<b>14.67</b>	<b>89.96</b>					
MATCH GROUP INC NEW COM, MTCH, 57667L107										
Sale	1.000	02/09/21	12/30/22	41.52	156.66			-115.14		
NETFLIX INC, NFLX, 64110L106										
Sale	0.366	02/04/21	12/28/22	100.88	199.47			-98.59		
Sale	0.363	03/01/21	12/28/22	100.05	199.73			-99.68		
<b>Subtotals</b>				<b>200.93</b>	<b>399.20</b>					
NIO INC SPON ADS EACH REP 1 ORD SHS CLAS, NIO, 62914V106										
Sale	3.000	03/02/21	12/30/22	29.01	138.59			-109.58		
Sale	0.635	03/08/21	12/30/22	6.13	23.96			-17.83		
<b>Subtotals</b>				<b>35.14</b>	<b>162.55</b>					
NVIDIA CORPORATION COM, NVDA, 67066G104										
Sale	4.000	01/29/21	12/28/22	558.64	526.67			31.97		

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PELTON INTERACTIVE INC CL A COM, PTON, 70614W100										
Sale	1.000	03/08/21	12/30/22	7.91	110.15			-102.24		
Sale	2.000	11/08/21	12/30/22	15.82	106.72			-90.90		
<b>Subtotals</b>				<b>23.73</b>	<b>216.87</b>					
PINTEREST INC CL A, PINS, 72352L106										
Sale	1.000	02/09/21	12/30/22	24.15	80.77			-56.62		
Sale	2.000	03/18/21	12/30/22	48.31	142.04			-93.73		
Sale	1.000	03/18/21	12/30/22	24.15	71.01			-46.86		
<b>Subtotals</b>				<b>96.61</b>	<b>293.82</b>					
SHOPIFY INC COM NPV CL A ISIN #CA82509L1, SHOP, 82509L107										
Sale	1.580	02/04/21	12/28/22	50.66	199.08			-148.42		
Sale	1.230	02/09/21	12/28/22	39.43	177.34			-137.91		
Sale	4.400	03/18/21	12/28/22	141.07	499.72			-358.65		
Sale	2.350	11/01/21	12/28/22	75.34	343.34			-268.00		
<b>Subtotals</b>				<b>306.50</b>	<b>1,219.48</b>					
TESLA INC COM, TSLA, 88160R101										
Sale	1.500	02/09/21	12/30/22	184.66	424.14			-239.48		
Sale	1.173	02/10/21	12/30/22	144.40	317.64			-173.24		
Sale	0.327	03/02/21	12/30/22	40.26	77.13			-36.87		
Sale	0.867	03/03/21	12/30/22	106.73	199.49			-92.76		
Sale	0.498	03/05/21	12/30/22	61.31	99.97			-38.66		
Sale	1.635	03/08/21	12/30/22	201.28	328.20			-126.92		

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# 2022 TAX REPORTING STATEMENT

AKSHAT VERMA

Account No. **Z08-503322** Customer Service: 800-544-6666  
Recipient ID No. **\*\*\*-\*\*-8638** 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

**Long-term transactions for which basis is reported to the IRS** --report on Form 8949 with Box D checked and/or Schedule D, Part II  
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 of property, Stock or Other Symbol, CUSIP	Quantity	1b Date Acquired	1c Date Sold or Disposed	1d Proceeds	1e Cost or Other Basis (b)	1f Accrued Market Discount	1g Wash Sale Loss Disallowed	Gain/Loss (-)	4 Federal Income Tax Withheld	14 State Tax Withheld
TESLA INC COM, TSLA, 88160R101										
Sale	1.767	03/17/21	12/30/22	217.53	396.93			-179.40		
<b>Subtotals</b>				<b>956.17</b>	<b>1,843.50</b>					
UPSTART HLDGS INC COM, UPST, 91680M107										
Sale	0.550	11/11/21	12/30/22	7.27	139.80			-132.53		
VELODYNE LIDAR INC COM, VLDR, 92259F101										
Sale	1.000	02/09/21	12/30/22	0.74	22.98			-22.24		
Sale	5.000	03/01/21	12/30/22	3.67	80.00			-76.33		
Sale	0.277	03/05/21	12/30/22	0.20	3.49			-3.29		
<b>Subtotals</b>				<b>4.61</b>	<b>106.47</b>					
<b>TOTALS</b>				<b>4,165.41</b>	<b>9,569.35</b>	<b>0.00</b>	<b>0.00</b>		<b>0.00</b>	
								<b>31.97</b>		
								<b>-5,435.91</b>		

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# 2022 TAX REPORTING STATEMENT

AKSHAT VERMA

Account No. **Z08-503322** Customer Service: 800-544-6666  
Recipient ID No. **\*\*\*-\*\*-8638** 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

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.

(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.

Amortization, accretion, and similar adjustments to cost basis are not provided for short-term instruments and unit investment trusts.

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# 2022 TAX REPORTING STATEMENT

AKSHAT VERMA

Account No. **Z08-503322** Customer Service: 800-544-6666  
Recipient ID No. **\*\*\*-\*\*-8638** Payer's Fed ID Number: 04-3523567

## Summary of 2022 Supplemental Information Not Reported to the IRS

Margin Interest Paid .....	1,462.98	Currency Realized Gain/Loss (USD) .....	0.00
Tax Exempt Investment Expense .....	0.00	Actual Payment Shortfall.....	0.00
Accrued Interest Paid on Purchases .....	0.00	Addition to Basis .....	0.00
Proceeds Investment Expenses .....	0.00	Account Fees.....	0.07
Severance Tax .....	0.00	Short Dividends.....	0.00
Administrative Expenses .....	0.00	Money Market Realized Gain/Loss.....	0.00
Non-deductible Generic Expenses .....	0.00	Short/Long Term Realized Gain/Loss.....	0.00
Deductible Generic Expenses .....	0.00	Mortgage Pool Statement (MBS).....	0.00

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# 2022 SUPPLEMENTAL INFORMATION

AKSHAT VERMA

Account No. **Z08-503322** Customer Service: 800-544-6666

Recipient ID No. **\*\*\*-\*\*-8638** 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-DIV Transactions

### Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP									
Date	1a Total Ordinary Dividends (includes 1b, 2e & 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	2e Section 897 Ordinary Dividends	5 Section 199A Dividends	12 Exempt Interest Dividends	13 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
FIDELITY 500 INDEX FUND, FXAIX, 315911750									
04/08/22	30.60			30.03		0.57			
07/01/22	22.92			21.57		1.35			
10/07/22	23.17			21.80		1.37			
12/16/22	25.49			23.98		1.51			
<b>Subtotals</b>	<b>102.18</b>			<b>97.38</b>		<b>4.80</b>			
-----									
NVIDIA CORPORATION COM, NVDA, 67066G104									
03/24/22	0.16			0.16					
07/01/22	0.36			0.36					
09/29/22	0.36			0.36					
12/22/22	0.36			0.36					
<b>Subtotals</b>	<b>1.24</b>			<b>1.24</b>					
-----									
<b>TOTALS</b>	<b>103.42</b>	<b>0.00</b>	<b>0.00</b>	<b>98.62</b>	<b>0.00</b>	<b>4.80</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

Short-term capital gain distributions reported on monthly/quarterly account statements are included in **1a** Total Ordinary Dividends on Form 1099-DIV.

To see the **2022** State Percentages of Tax-Exempt Income for Fidelity Federal Tax-Exempt Funds or the Percentage of Income from U.S. Government Securities for applicable Fidelity Funds, visit [Fidelity.com/fundtaxinfo](https://www.fidelity.com/fundtaxinfo).



# 2022 SUPPLEMENTAL INFORMATION

AKSHAT VERMA

Account No. **Z08-503322** Customer Service: 800-544-6666  
Recipient ID No. **\*\*\*-\*\*-8638** Payer's Fed ID Number: 04-3523567

**Note: This information is not reported to the IRS. It may assist you in tax return preparation.**

## Account Fees

Description	Date	Amount
NIO INC SPON ADS EACH REP 1 ORD SHS	04/11/22	0.07
<b>TOTAL</b>		<b>0.07</b>

## Margin Interest Paid

Description	Date	Amount
MARGIN INTEREST @ 10.575% AVG	08/21/22	123.23
MARGIN INTEREST @ 10.575% AVG	09/20/22	155.46
MARGIN INTEREST @ 10.575% AVG	09/22/22	10.46
MARGIN INTEREST @ 11.325% AVG	10/20/22	152.22
MARGIN INTEREST @ 11.325% AVG	11/03/22	57.94
MARGIN INTEREST @ 12.075% AVG	11/20/22	75.02
MARGIN INTEREST @ 12.075% AVG	12/15/22	111.44
MARGIN INTEREST @ 12.575% AVG	12/20/22	23.21
MARGIN INTEREST @ 12.575% AVG	12/29/22	42.20
MARGIN INTEREST @ 8.325% AVG B	01/20/22	27.73
MARGIN INTEREST @ 8.325% AVG B	02/21/22	42.00
MARGIN INTEREST @ 8.325% AVG B	03/17/22	45.13
MARGIN INTEREST @ 8.575% AVG B	03/20/22	8.90
MARGIN INTEREST @ 8.575% AVG B	04/20/22	103.21
MARGIN INTEREST @ 8.575% AVG B	05/05/22	64.96
MARGIN INTEREST @ 9.075% AVG B	05/22/22	84.93
MARGIN INTEREST @ 9.075% AVG B	06/16/22	130.35
MARGIN INTEREST @ 9.825% AVG B	06/20/22	22.58
MARGIN INTEREST @ 9.825% AVG B	07/20/22	143.85
MARGIN INTEREST @ 9.825% AVG B	07/28/22	38.16
<b>TOTAL</b>		<b>1,462.98</b>

**Important Tax Return Document Enclosed.**

