



#BWNJGWM

SHI VA YELAKUNTTLA &
SRI VANI KALVAKUNTA JT TEN
TOD SUBJECT TO STA RULES
2962 GREY HAWK LANE
CUMMING GA 30040-1221

1099 Consolidated Tax Statement Tax Year 2022 - ORIGINAL

Date Issued
January 23, 2023

Your Financial Advisor
VIRTUAL ADVISOR
PO BOX 290157
TAMPA, FL 33687
888-454-0555

Account Number
574 926768 519

Account Mailing Address

Account Owner

SHI VA YELAKUNTLA &
SRI VANI KALVAKUNTA JT TEN
TOD SUBJECT TO STA RULES
2962 GREY HAWK LANE
CUMMING GA 30040-1221

**Legal Name and Address Reported
to IRS and State Taxing Authorities**

Shi va Yel akuntl a
2962 GREY HAWK LANE
CUMMING GA 30040

Customer Service: 866-324-6088

What's included in this packet:

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This Morgan Stanley 1099 Consolidated Tax Statement for 2022 provides your official tax information for use when preparing your tax return. It is important to note that the income information that was reported on your December account statement will not have included certain adjustments occurring after year-end that are reflected on your 1099 and that are necessary for tax reporting purposes. The Account Number reflected on your 1099 Forms is reflected as of December 31, 2022. If your Account Number subsequently changes after December 31, 2022, your new Account Number is reflected on your next scheduled statement once the Account Number change becomes effective.

The following tax forms are not included in this statement and are sent individually in separate mailings, if required: 1099-Q, 1042-S, 2439, 5498, 5498-ESA, REMIC, Schedule K-1 and Puerto Rico 480.6A, B, C & D.

Morgan Stanley is pleased to provide you with the ability to download your tax information into the following individual tax preparation software applications: **TurboTax®**, **H&R Block Tax Software®**, **Lacerte®**, **TaxAct®** and **ProSystem fx®**. You also have the ability to download Realized Gain/Loss transactions into Microsoft Excel® from Morgan Stanley Online. *You must be registered with Morgan Stanley Online to take advantage of these features. To enroll in Morgan Stanley Online, visit www.morganstanley.com/online.*

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TaxAct® is a registered trademark of TaxAct, Inc.



***** WARNING - CORRECTED TAX FORMS POSSIBLE *****

The Forms 1099 included in your Morgan Stanley Consolidated Tax Statement were prepared based upon information provided by the issuer of each security. The issuer may change the tax status of a distribution reported to you subsequent to the issuance of this Consolidated Tax Statement. In that case, we are required to send you one or more corrections.

As permitted under Internal Revenue Code, Morgan Stanley will not issue a corrected Form 1099 if the total correction for the form is \$100 or less ("de minimis amounts"). For more information on the de minimis safe harbor rules, to elect to opt-out and receive a corrected Form 1099 for de minimis amounts, or to revoke a prior election to opt-out, please contact your Financial Advisor.



Morgan Stanley

1099 Consolidated Tax Statement Tax Year 2022 Copy B For Recipient

Morgan Stanley Domestic Holdings, Inc.
Morgan Stanley Smith Barney, LLC
1 New York Plaza
40th Floor
New York, NY 10004
Identification Number: 20-8764829
Taxpayer ID Number: XXX-XX-8669
Account Number: 574 926768 519

Name Reported to the IRS: Shiva Yelakuntla
2962 GREY HAWK LANE
CUMMING GA 30040

Customer Service: 866-324-6088

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.

IRS 2022 FORM 1099-DIV - DIVIDENDS AND DISTRIBUTIONS BOX OMB NO. 1545-0110	
1a. TOTAL ORDINARY DIVIDENDS	\$0.00
1b. QUALIFIED DIVIDENDS	\$0.00
2a. TOTAL CAPITAL GAIN DISTRIBUTIONS	\$0.00
2b. UNRECAP. SEC. 1250 GAIN	\$0.00
2d. COLLECTIBLES (28%) GAIN	\$0.00
2e. SECTION 897 ORDINARY DIVIDENDS	\$0.00
2f. SECTION 897 CAPITAL GAIN	\$0.00
3. NON-DIVIDEND DISTRIBUTIONS	\$0.00
4. FEDERAL INCOME TAX WITHHELD	\$0.00
5. SECTION 199A DIVIDENDS	\$0.00
6. INVESTMENT EXPENSES	\$0.00
7. FOREIGN TAX PAID	\$0.00
9. CASH LIQUIDATION DISTRIBUTIONS	\$0.00
10. NON-CASH LIQUIDATION DISTRIBUTIONS	\$0.00
12. EXEMPT-INTEREST DIVIDENDS	\$0.00
13. SPECIFIED PRIVATE ACTIVITY BOND INTEREST DIVIDENDS	\$0.00
IRS 2022 FORM 1099-INT - INTEREST INCOME BOX OMB NO. 1545-0112	
1. INTEREST INCOME	\$69.90
2. EARLY WITHDRAWAL PENALTY	\$0.00
3. INTEREST ON U.S. SAVINGS BONDS AND TREAS. OBLIGATIONS	\$0.00
4. FEDERAL INCOME TAX WITHHELD	\$0.00
5. INVESTMENT EXPENSES	\$0.00
6. FOREIGN TAX PAID	\$0.00
8. TAX-EXEMPT INTEREST	\$0.00
9. SPECIFIED PRIVATE ACTIVITY BOND INTEREST	\$0.00
10. MARKET DISCOUNT	\$0.00
11. BOND PREMIUM	\$0.00
12. BOND PREMIUM ON TREASURY OBLIGATIONS	\$0.00
13. BOND PREMIUM ON TAX-EXEMPT BOND	\$0.00
14. TAX-EXEMPT AND TAX CREDIT BOND CUSIP NO.	

IRS 2022 FORM 1099-MISC - MISCELLANEOUS INFORMATION BOX OMB NO. 1545-0115	
1. RENTS	\$0.00
2. ROYALTIES	\$0.00
3. OTHER INCOME	\$695.00
4. FEDERAL INCOME TAX WITHHELD	\$0.00
8. SUBSTITUTE PAYMENTS IN LIEU OF DIVIDENDS OR INTEREST	\$0.00
IRS 2022 FORM 1099-OID - ORIGINAL ISSUE DISCOUNT BOX OMB NO. 1545-0117	
1. ORIGINAL ISSUE DISCOUNT FOR 2022	\$0.00*
2. OTHER PERIODIC INTEREST	\$0.00
4. FEDERAL INCOME TAX WITHHELD	\$0.00
5. MARKET DISCOUNT	\$0.00
6. ACQUISITION PREMIUM	\$0.00
8. OID ON U.S. TREASURY OBLIGATIONS	\$0.00*
9. INVESTMENT EXPENSES	\$0.00
10. BOND PREMIUM	\$0.00
11. TAX-EXEMPT OID	\$0.00
*This may not be the correct figure to report on your income tax return. See instructions on the back.	
IRS 2022 FORM 1099-B - PROCEEDS FROM BROKER AND BARTER EXCHANGE TRANSACTIONS BOX OMB NO. 1545-0715	
1d. PROCEEDS	\$0.00
COVERED SECURITIES	\$0.00
NONCOVERED SECURITIES	\$0.00
1e. COST OR OTHER BASIS OF COVERED SECURITIES	\$0.00
1f. ACCRUED MARKET DISCOUNT	\$0.00
1g. WASH SALE LOSS DISALLOWED	\$0.00
4. FEDERAL INCOME TAX WITHHELD	\$0.00

IMPORTANT TAX INFORMATION -- PLEASE RETAIN FOR YOUR RECORDS



1099-INT INTEREST INCOME

Interest Income

DESCRIPTION	CUSIP	PAY DATE	AMOUNT	FEDERAL INCOME TAX WITHHELD
MORGAN STANLEY PRIVATE BANK NA	061871976	03/31/22	\$0.04	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	04/29/22	\$0.03	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	06/30/22	\$0.02	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	07/29/22	\$0.06	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	08/31/22	\$0.04	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	09/30/22	\$0.04	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	10/31/22	\$0.05	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	11/30/22	\$0.03	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	12/30/22	\$0.01	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	07/29/22	\$10.75	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	08/31/22	\$17.19	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	09/30/22	\$16.89	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	10/21/22	\$15.48	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	11/30/22	\$2.73	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	12/30/22	\$6.54	\$0.00
Total Interest Income 1099-INT box 1			\$69.90	

Total Federal Income Tax Withheld 1099-INT box 4 **\$0.00**

The amount of tax-exempt interest paid to you in 2022 must be reported on the applicable Form 1040, U.S. Individual Income Tax Return, for 2022. The amount of tax-exempt AMT interest paid to you in 2022 must be taken into account in computing the Alternative Minimum Tax reported on Form 1040 for 2022.

1099-MISC MISCELLANEOUS INFORMATION

Other Income

DESCRIPTION	CUSIP	PAY DATE	AMOUNT	FEDERAL INCOME TAX WITHHELD
CASHPLUS BONUS	000000000	04/14/22	\$695.00	\$0.00
Total Other Income 1099-MISC box 3			\$695.00	

Total Federal Income Tax Withheld 1099-MISC box 4 **\$0.00**

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