



Anil Veeramalla
313 Niblewill Place
Marietta, GA 30066

January 26, 2023

The following tax information represents a consolidated record of your applicable Fundrise investments for tax year 2022.

The information contained herein pertains only to investments in the eREITs, Interval Funds, and Short-Term Notes. If you hold shares in the Fundrise eFund or other direct equity investments, a Schedule K-1 or Form K-1 will be distributed upon completion, which is anticipated to occur in mid-March 2023.

As a reminder and in accordance with IRS Regulations, we will not issue a Form 1099-DIV if your aggregate distributions from a fund (eREIT or Interval Fund) in the given tax year were less than \$10. This means that you may not receive tax documents for all of the funds in which you hold shares.

If you completed a share transfer or earned promotional shares in tax year 2022, the cost basis related to your redeemed transferred or promotional shares has not been included on your Form(s) 1099-B. Fundrise is only able to track basis pertaining to originally acquired shares.

Fundrise strives to provide your Form 1099 tax information as early and as accurately as possible. If Fundrise receives updated information for investments that you held during tax year 2022, we are required by the IRS to send you a CORRECTED Form 1099 with changes clearly highlighted. Please plan your tax preparation accordingly.

Enclosed: Important Official IRS Form(s) 1099

The report in this package contains your income tax return documents and year-end summary. Please retain this package for tax preparation purposes.

Although the Fundrise team seeks to provide timely and accurate information pertaining to the status of your investments, we cannot provide tax advice. While we do provide certain general tax information about the forms you may be receiving in our [Help Center](#), please consult with a qualified tax advisor, CPA, or financial planner for specific questions on your tax forms.



If you have any questions or need additional information about your Form(s) or year-end summary, please contact investments@fundrise.com. We would be happy to help answer any questions you may have. Thank you for making another successful year possible for us to provide a simple, low-cost alternative for you to earn potentially better, more stable returns on your investments.

Best,
The Fundrise Team
11 Dupont Circle NW
9th Floor
Washington, D.C. 20036
investments@fundrise.com

Neither Fundrise nor any of its affiliates provide tax advice and do not represent in any manner that the outcomes described herein will result in any particular tax consequence. Investors should confer with their personal tax advisors regarding the tax consequences based on their particular circumstances.

CORRECTED (if checked)

Dividends and Distributions

**Copy B
For Recipient**

This is important tax information and is being furnished to the IRS. 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.

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. Fundrise Balanced eREIT II LLC 11 Dupont Circle NW, 9th Floor Washington, DC 20036 Telephone Number: (202) 584-0550		1a Total ordinary dividends \$	OMB No. 1545-0110 Form 1099-DIV (Rev. January 2022) For calendar year 20 <u>22</u>	
		1b Qualified dividends \$		
		2a Total capital gain distr. \$	2b Unrecap. Sec. 1250 gain \$	
PAYER'S TIN 84-4465115	RECIPIENT'S TIN XXX-XX-3048	2c Section 1202 gain \$	2d Collectibles (28%) gain \$	
		2e Section 897 ordinary dividends \$	2f Section 897 capital gain \$	
RECIPIENT'S name Anil Veeramalla		3 Nondividend distributions \$ 10.66	4 Federal income tax withheld \$	
		5 Section 199A dividends \$	6 Investment expenses \$	
Street address (including apt. no.) 313 Niblewill Place		7 Foreign tax paid \$	8 Foreign country or U.S. possession	
		9 Cash liquidation distributions \$	10 Noncash liquidation distributions \$	
City or town, state or province, country, and ZIP or foreign postal code Marietta, GA 30066		11 FATCA filing requirement <input type="checkbox"/>	12 Exempt-interest dividends \$	
			13 Specified private activity bond interest dividends \$	
Account number (see instructions) 804713		14 State	15 State identification no.	16 State tax withheld \$
				\$

CORRECTED (if checked)

Dividends and Distributions

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PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. Fundrise Real Estate Interval Fund, LLC 11 Dupont Circle NW, 9th Floor Washington, DC 20036 Telephone Number: (202) 584-0550		1a Total ordinary dividends \$	OMB No. 1545-0110 Form 1099-DIV (Rev. January 2022) For calendar year 20 <u>22</u>
PAYER'S TIN 83-4327607		1b Qualified dividends \$	2b Unrecap. Sec. 1250 gain \$
RECIPIENT'S TIN XXX-XX-3048		2c Section 1202 gain \$	2d Collectibles (28%) gain \$
RECIPIENT'S name Anil Veeramalla		2e Section 897 ordinary dividends \$	2f Section 897 capital gain \$
Street address (including apt. no.) 313 Niblewill Place		3 Nondividend distributions \$ 69.05	4 Federal income tax withheld \$
City or town, state or province, country, and ZIP or foreign postal code Marietta, GA 30066		5 Section 199A dividends \$	6 Investment expenses \$
11 FATCA filing requirement <input type="checkbox"/>		7 Foreign tax paid \$	8 Foreign country or U.S. possession
Account number (see instructions) 804713		9 Cash liquidation distributions \$	10 Noncash liquidation distributions \$
		12 Exempt-interest dividends \$	13 Specified private activity bond interest dividends \$
		14 State	15 State identification no.
		16 State tax withheld \$	16 State tax withheld \$