



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

# 2022 TAX REPORTING STATEMENT

RAJESH MOGULOJU

Account No. **Z03-847133** Customer Service: 800-544-6666  
Recipient ID No. **\*\*\*-\*\*-7065** Payer's Fed ID Number: 04-3523567

eDelivered

RAJESH MOGULOJU  
UNIT 207  
1305 SE UNIVERSITY AVE  
WAUKEE IA 50263-8465

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 .....	0.00	6 Investment Expenses .....	0.00
1b Qualified Dividends .....	0.00	7 Foreign Tax Paid.....	0.00
2a Total Capital Gain Distributions .....	0.00	8 Foreign Country or U.S. Possession.....	
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 .....	0.00		

**Form 1099-INT \***

**2022 Interest Income**

Copy B for Recipient  
(OMB No. 1545-0112)

1 Interest Income .....	1.19	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	3,646.14	3,117.51	0.00	0.00	528.63	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	2,851.45	1,195.03	0.00	0.00	1,656.42	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
	<b>6,497.59</b>	<b>4,312.54</b>	<b>0.00</b>	<b>0.00</b>	<b>2,185.05</b>	<b>0.00</b>

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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# 2022 TAX REPORTING STATEMENT

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Account No. **Z03-847133** Customer Service: 800-544-6666  
 Recipient ID No. **\*\*\*-\*\*-7065** 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  
 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
APOLLO GLOBAL MGMT INC COM, APO, 03769M106										
Cash In Lieu	0.142	03/31/21	01/04/22	10.35	5.28(e)			5.07		
Cash In Lieu	0.111	06/30/21	01/04/22	8.13	5.56(e)			2.57		
Cash In Lieu	0.101	09/30/21	01/04/22	7.39	5.15(e)			2.24		
Sale	15.944	03/31/21	02/14/22	1,068.55	594.48(e)			474.07		
Sale	12.528	06/30/21	02/14/22	839.61	625.57(e)			214.04		
Sale	11.389	09/30/21	02/14/22	763.27	580.25(e)			183.02		
<b>Subtotals</b>				<b>2,697.30</b>	<b>1,816.29</b>					
CALL META \$200 EXP 09/02/2022, META22090, 6055029SQ										
Sale	1.000	07/26/22	07/27/22	247.31	196.68			50.63		
PALANTIR TECHNOLOGIES INC CL A, PLTR, 69608A108										
Sale	34.000	02/10/22	07/26/22	320.74	476.68			-155.94		
Sale	1.000	02/10/22	07/26/22	9.43	14.00			-4.57		
<b>Subtotals</b>				<b>330.17</b>	<b>490.68</b>					
PAYPAL HLDGS INC COM, PYPL, 70450Y103										
Sale	3.000	11/09/21	02/10/22	371.36	613.86			-242.50		
<b>TOTALS</b>				<b>3,646.14</b>	<b>3,117.51</b>	<b>0.00</b>	<b>0.00</b>		<b>931.64</b>	<b>0.00</b>
									<b>Box A Short-Term Realized Gain</b>	
									<b>Box A Short-Term Realized Loss</b>	
										<b>-403.01</b>

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Account No. **Z03-847133** Customer Service: 800-544-6666  
Recipient ID No. **\*\*\*-\*\*-7065** 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
APOLLO GLOBAL MGMT INC COM, APO, 03769M106										
Cash In Lieu	0.212	09/30/20	01/04/22	15.52	5.35(e)			10.17		
Cash In Lieu	0.162	12/31/20	01/04/22	11.83	5.16(e)			6.67		
Sale	23.917	09/30/20	02/14/22	1,602.89	602.98(e)			999.91		
Sale	18.222	12/31/20	02/14/22	1,221.21	581.54(e)			639.67		
<b>Subtotals</b>				<b>2,851.45</b>	<b>1,195.03</b>					
<b>TOTALS</b>				<b>2,851.45</b>	<b>1,195.03</b>	<b>0.00</b>	<b>0.00</b>		<b>0.00</b>	
								<b>1,656.42</b>		
								<b>0.00</b>		

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.
- (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.

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**FORM 1099-B\***

**2022 Proceeds from Broker and Barter Exchange Transactions**

Copy B for Recipient OMB No. 1545-0715

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

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

Margin Interest Paid .....	0.00	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.....	0.00
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

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**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, Symbol, CUSIP	1 Interest Income	6 Foreign Tax Paid	11 Bond Premium	Noncovered Bond Premium	10 Market Discount	Noncovered Market Discount
CASH, FCASH, 315994103						
07/29/22	0.03					
08/31/22	0.38					
09/30/22	0.36					
10/31/22	0.13					
11/30/22	0.12					
12/30/22	0.17					
<b>Subtotals</b>	<b>1.19</b>					
<b>TOTALS</b>	<b>1.19</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>



# 2022 SUPPLEMENTAL INFORMATION

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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

Description of Property, Stock or Other Symbol, Cusip								
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
APOLLO GLOBAL MGMT INC COM, APO, 03769M106								
QSP	0.142	03/31/21	01/04/22	10.35	0.94	6.22	0.00	4.13
QSP	0.111	06/30/21	01/04/22	8.13	0.99	6.55	0.00	1.58
QSP	0.101	09/30/21	01/04/22	7.39	0.92	6.07	0.00	1.32
QSP	15.944	03/31/21	02/14/22	1,068.55	105.84	700.32	0.00	368.23
QSP	12.528	06/30/21	02/14/22	839.61	111.38	736.95	0.00	102.66
QSP	11.389	09/30/21	02/14/22	763.27	103.30	683.55	0.00	79.72
<b>Totals</b>				<b>2,697.30</b>		<b>2,139.66</b>		
				<b>Short-Term Adjusted Realized Gain</b>				<b>557.64</b>
				<b>Short-Term Adjusted Realized Loss</b>				<b>0.00</b>
				<b>Wash Sale Loss Disallowed</b>			<b>0.00</b>	

## 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.

### Long-Term Transactions

Description of Property, Stock or Other Symbol, Cusip								
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
APOLLO GLOBAL MGMT INC COM, APO, 03769M106								
QSP	0.212	09/30/20	01/04/22	15.52	0.95	6.30	0.00	9.22
QSP	0.162	12/31/20	01/04/22	11.83	0.92	6.08	0.00	5.75
QSP	23.917	09/30/20	02/14/22	1,602.89	107.35	710.33	0.00	892.56
QSP	18.222	12/31/20	02/14/22	1,221.21	103.54	685.08	0.00	536.13







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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.

### Long-Term Transactions

Description of Property, Stock or Other Symbol, Cusip								
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
<b>Totals</b>				<b>2,851.45</b>		<b>1,407.79</b>		
				<b>Long-Term Adjusted Realized Gain</b>				<b>1,443.66</b>
				<b>Long-Term Adjusted Realized Loss</b>				<b>0.00</b>
				<b>Wash Sale Loss Disallowed</b>			<b>0.00</b>	

(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

(x) Date of Acquisition is the date that shares were acquired from your Equity Plan and deposited into your brokerage account.

(y) 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.

(z) 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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