

# 2022 Tax Summary Gauri 529

5:57 PM CST, Wed, Feb 8, 2023

**Account #:** 90090155  
**BIN:** 80377030  
**Registration:** MFS 529 SAVINGS PLAN  
 ARVIND KUMAR  
 FBO GAURI ARORA  
 4611 NW SIDEWINDER PL  
 BEAVERTON OR 97006-7386

**Mgmt CO:** MFS INVESTMENT MANAGEMENT  
**Fund Name:** MFS LIFETIME INCOME FUND 2534 (529A)  
**Fund Code:** 2534  
**Ticker:** MLLQX **Total Shares:** 0.0000  
**CUSIP:** 55274K876 **Account Value:** \$0.00  
**Account Type:** 37 - SECTION 529 ACCOUNT

**Phone #:** Not On File

**Value** (as of 12/31/ 2022) : **\$0.00**

## Earnings

Ordinary Income: \$0.00  
 Long Term Cap Gains: \$0.00  
 Short Term Cap Gains: \$0.00  
 Foreign Tax Paid: \$0.00  
 Qualified Interest Income (QII) Exempt Dividend: \$0.00

## Withholdings

Dividend (Ordinary Income Div., LTCG, STCG): \$0.00  
 Taxable Dividend  
 - Federal: \$0.00  
 Non-Taxable Dividend  
 - Federal: \$0.00  
 NRA: \$0.00  
 FATCA: \$0.00  
 Federal Retirement Distributions: \$0.00  
 State Retirement Distributions: \$0.00

## Reallocations

Ordinary Income: \$0.00  
 Qualified Dividends: \$0.00  
 Long Term Cap Gains: \$0.00  
 Short Term Cap Gains: \$0.00  
 Taxable Dividends: \$0.00  
 Non-Taxable Dividends: \$0.00  
 Section 1250 Cap Gains: \$0.00  
 Return of Capital: \$0.00  
 28% Cap Gains: \$0.00  
 Recalculated Qualified Interest Income (QII) Exempt Div.: \$0.00  
 Private Activity Bond Interest: \$0.00  
 FMV of Certain Specified Assets: \$0.00  
 Section 199A Dividends: \$0.00

## Redemptions

	Total	Non-Dealer	Dealer
Gross Redemptions:	\$0.00	\$0.00	\$0.00
Withholding:			
- Federal:	\$0.00	\$0.00	\$0.00
<b>Total Foreign Retirement Account Redemption: \$0.00</b>			

## Cost Basis

Reported Transactions	Non Reported Transactions		
Short Term:	\$0.00	Short Term:	\$0.00
Long Term:	\$0.00	Long Term:	\$0.00
		Unknown:	\$0.00

## Retirement Account Information

Distributions	Contributions		
Premature:	\$0.00	IRA (tax year):	\$0.00
Premature, Exception Applies:	\$0.00	IRA (current year):	\$0.00
Disability:	\$0.00	Employee (tax year):	\$0.00
Death:	\$0.00	Employee (current year):	\$0.00
Prohibited:	\$0.00	Employer (tax year):	\$0.00
Normal:	\$0.00	Employer (current year):	\$0.00
Simple IRA:	\$0.00	Employer Salary Reduction (tax year):	\$0.00
Loan Default:	\$0.00	Employer Salary Reduction (current year):	\$0.00
Roth IRA - Where Exception Applies:	\$0.00	Roth Conversion:	\$0.00

IRA Recharacterization (current year):	\$0.00	Rollover:	\$0.00
IRA Recharacterization (prior year):	\$0.00	IRA Recharacterization:	\$0.00
Return of Excess Contribs (current year):	\$0.00	Minimum Distribution (RMD) required next year:	N/A
Return of Excess Contribs (prior year):	\$0.00		
Return of Excess Contribs (otp year):	\$0.00		
Return of Excess Earnings (current year):	\$0.00		
Return of Excess Earnings (prior year):	\$0.00		
Return of Excess Earnings (otp year):	\$0.00		
Direct Rollover:	\$0.00		
Direct R/O Qualified Plan to IRA (Death):	\$0.00		
Return of Excess Contribs - Section 415:	\$0.00		

## Education Account Information

### Distributions

### Contributions

Coverdell ESA Distributions:	\$0.00	Coverdell ESA Rollover:	\$0.00
Coverdell ESA TTEE to TTEE Transfer:	\$0.00	Coverdell ESA Contributions:	\$0.00
529 Plan to Owner - Gross:	\$0.00	529 Plan (not reported to the IRS):	\$6,000.00
- Basis:	\$0.00		
- Earnings:	\$0.00		
529 Plan to Beneficiary - Gross:	\$0.00		
- Basis:	\$0.00		
- Earnings:	\$0.00		
529 Plan TTEE to TTEE Transfer - Gross:	\$0.00		
- Basis:	\$0.00		
- Earnings:	\$0.00		

## Status Details

	Form Status	Date Produced
1099DIV	Not Created	
1099INT	Not Created	
1042S	Not Created	
1099B	Not Created	
5498/5498 ESA	Not Created	

Please note that this data is for informational purposes only. These totals will not be finalized until the Management Company completes its year-end tax preparation process. For additional information about year-end reporting, please contact the Management Company.

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