

2022 Tax Summary Keshav 529

5:58 PM CST, Wed, Feb 8, 2023

Account #: 90090106
BIN: 22653669
Registration: MFS 529 SAVINGS PLAN
 ARVIND KUMAR
 FBO KESHAV ARORA
 4611 NW SIDEWINDER PL
 BEAVERTON OR 97006-7386

Mgmt CO: MFS INVESTMENT MANAGEMENT
Fund Name: MFS CONSERVATIVE ALLOCATION FUND 2526 (529 A)
Fund Code: 2526
Ticker: ECLAX **Total Shares:** 0.0000
CUSIP: 55273G645 **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
Total Foreign Retirement Account Redemption: \$0.00			

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):	\$2,000.00
- 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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