



#BWNJGWM

PAVAN CHEBROLU &  
VENKATA MANASA MUVVALA JT TEN  
64 GRAND HICKORY WAY  
DAWSONVILLE GA 30534-5972

## 1099 Consolidated Tax Statement Tax Year 2023 - ORIGINAL

**Date Issued**  
February 05, 2024

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

**Account Number**  
574 957836 519

**Account Mailing Address**

**Account Owner**  
PAVAN CHEBROLU &  
VENKATA MANASA MUVVALA JT TEN  
64 GRAND HICKORY WAY  
DAWSONVILLE GA 30534-5972

**Legal Name and Address Reported  
to IRS and State Taxing Authorities**  
PAVAN CHEBROLU  
64 GRAND HICKORY WAY  
DAWSONVILLE GA 30534

**Customer Service: 866-324-6088**

**What's included in this packet:**

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This Morgan Stanley 1099 Consolidated Tax Statement for 2023 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, 2023. If your Account Number subsequently changes after December 31, 2023, your new Account Number is reflected on your next scheduled statement once the Account Number change becomes effective.

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

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®**, and **Lacerte®**. 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](http://www.morganstanley.com/online).*

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**\*\*\* 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 1099 Consolidated Tax Statement. In that case, we are required to send you one or more corrections.



# Morgan Stanley

## 1099 Consolidated Tax Statement Tax Year 2023 Copy B For Recipient

Morgan Stanley Capital Management, LLC  
Morgan Stanley Smith Barney, LLC  
1 New York Plaza  
7th Floor  
New York, NY 10004  
Identification Number: 11-3658445  
Taxpayer ID Number: XXX-XX-0043  
Account Number: 574 957836 519

Name Reported to the IRS: PAVAN CHEBROLU  
64 GRAND HICKORY WAY  
DAWSONVILLE GA 30534

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 2023 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
<b>4. FEDERAL INCOME TAX WITHHELD</b>	<b>\$0.00</b>
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 2023 FORM 1099-INT - INTEREST INCOME BOX OMB NO. 1545-0112	
1. INTEREST INCOME	\$0.78
2. EARLY WITHDRAWAL PENALTY	\$0.00
3. INTEREST ON U.S. SAVINGS BONDS AND TREAS. OBLIGATIONS	\$0.00
<b>4. FEDERAL INCOME TAX WITHHELD</b>	<b>\$0.00</b>
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 2023 FORM 1099-MISC - MISCELLANEOUS INFORMATION BOX OMB NO. 1545-0115	
1. RENTS	\$0.00
2. ROYALTIES	\$0.00
3. OTHER INCOME	\$695.00
<b>4. FEDERAL INCOME TAX WITHHELD</b>	<b>\$0.00</b>
8. SUBSTITUTE PAYMENTS IN LIEU OF DIVIDENDS OR INTEREST	\$0.00
IRS 2023 FORM 1099-OID - ORIGINAL ISSUE DISCOUNT BOX OMB NO. 1545-0117	
1. ORIGINAL ISSUE DISCOUNT FOR 2023	\$0.00*
2. OTHER PERIODIC INTEREST	\$0.00
<b>4. FEDERAL INCOME TAX WITHHELD</b>	<b>\$0.00</b>
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 2023 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
<b>4. FEDERAL INCOME TAX WITHHELD</b>	<b>\$0.00</b>

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	05/31/23	\$0.01	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	06/30/23	\$0.09	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	07/31/23	\$0.14	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	08/31/23	\$0.10	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	09/29/23	\$0.10	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	10/31/23	\$0.13	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	11/30/23	\$0.12	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	12/29/23	\$0.09	\$0.00
<b>Total Interest Income</b> 1099-INT box 1			<b>\$0.78</b>	

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

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

**1099-MISC MISCELLANEOUS INFORMATION**

**Other Income**

DESCRIPTION	CUSIP	PAY DATE	AMOUNT	FEDERAL INCOME TAX WITHHELD
CASHPLUS BONUS	000000000	05/12/23	\$695.00	\$0.00
<b>Total Other Income</b> 1099-MISC box 3			<b>\$695.00</b>	

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

Morgan Stanley

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