



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

# 2023 TAX REPORTING STATEMENT

SHIVKUMAR NARAYANAN

Account No. **X84-801896** Customer Service: 800-544-6666  
 Recipient ID No. **\*\*\*-\*\*-8561** Payer's Fed ID Number: 04-3523567

eDelivered

SHIVKUMAR NARAYANAN  
 1032 106TH AVE NE #A214  
 APT A214 BELCARRA APARTMENTS  
 BELLEVUE WA 98004

Payer's Name and Address:  
 NATIONAL FINANCIAL SERVICES LLC  
 499 WASHINGTON BLVD  
 JERSEY CITY, NJ 07310

**Form 1099-DIV \***

**2023 Dividends and Distributions**

Copy B for Recipient  
 (OMB No. 1545-0110)

1a Total Ordinary Dividends .....	6,969.61	6 Investment Expenses .....	0.00
1b Qualified Dividends .....	968.19	7 Foreign Tax Paid.....	0.00
2a Total Capital Gain Distributions .....	0.00	8 Foreign Country or U.S. Possession.....	0.00
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 .....	1,753.85		

**Form 1099-INT \***

**2023 Interest Income**

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

1 Interest Income .....	0.00	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 \*

## 2023 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 2023 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	22,669.90	21,722.40	0.00	0.00	947.50	0.00
Short-term transactions for which basis is <u>not reported</u> to the IRS	4,915.55	0.00	0.00	0.00	4,915.55	0.00
Long-term transactions for which basis is <u>reported</u> to the IRS	3,225.60	3,969.48	0.00	7.12	-743.88	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
	30,811.05	25,691.88	0.00	7.12	5,119.17	0.00

1099-B amounts are reported individually to the IRS. Refer to the Form 1099-B sections in this statement, if applicable.  
The disallowed loss is included in the cost basis; therefore, it is calculated into the realized gain/loss.

## Summary of 2023 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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**FORM 1099-B\***

## 2023 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
INTEL CORP COM USD0.001, INTC, 458140100										
Sale	1.000	04/26/22	03/29/23	30.86	45.90			-15.04		
Sale	0.397	05/27/22	03/29/23	12.25	17.54			-5.29		
Sale	4.000	06/21/22	03/29/23	123.44	150.60			-27.16		
Sale	10.000	07/08/22	03/29/23	308.60	376.00			-67.40		
Sale	65.000	07/14/22	03/29/23	2,005.88	2,385.50			-379.62		
Sale	50.000	08/02/22	03/29/23	1,542.99	1,810.00			-267.01		
Sale	1.991	08/30/22	03/29/23	61.44	64.77			-3.33		
Sale	4.000	09/15/22	03/29/23	123.44	115.00			8.44		
Sale	5.000	09/22/22	03/29/23	154.30	141.25			13.05		
Sale	30.000	10/07/22	03/29/23	925.79	776.10			149.69		
Sale	150.000	10/18/22	03/29/23	4,628.96	3,880.50			748.46		
Sale	350.000	11/02/22	03/29/23	10,800.91	9,835.00			965.91		
Sale	9.063	11/29/22	03/29/23	279.68	262.23			17.45		
Sale	25.000	12/14/22	03/29/23	771.49	701.75			69.74		
Sale	10.495	02/27/23	03/29/23	323.88	264.26			59.62		
<b>Subtotals</b>				<b>22,093.91</b>	<b>20,826.40</b>					
-----										
TESLA INC COM, TSLA, 88160R101										
Sale	3.000	08/05/22	03/29/23	575.99	896.00			-320.01		
<b>TOTALS</b>				<b>22,669.90</b>	<b>21,722.40</b>	<b>0.00</b>	<b>0.00</b>		<b>0.00</b>	
								<b>2,032.36</b>		
								<b>-1,084.86</b>		

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Recipient ID No. **\*\*\*-\*\*-8561** Payer's Fed ID Number: 04-3523567

FORM 1099-B\*

## 2023 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

**Short-term transactions for which basis is not reported to the IRS** --report on Form 8949 with Box B 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
AMAZON.COM INC, AMZN, 023135106										
Sale	39.000	06/15/23	06/15/23	4,915.55	0.00			4,915.55		
<b>TOTALS</b>				<b>4,915.55</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>		<b>0.00</b>	
								<b>4,915.55</b>		
								<b>0.00</b>		

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FORM 1099-B\*

## 2023 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
INTEL CORP COM USD0.001, INTC, 458140100										
Sale	7.000	01/31/22	03/29/23	216.02	336.70		7.12	-120.68		
Sale	0.413	01/31/22	03/29/23	12.74	17.52			-4.78		
Sale	40.000	02/14/22	03/29/23	1,234.39	1,902.00			-667.61		
Sale	0.054	02/25/22	03/29/23	1.67	2.56			-0.89		
<b>Subtotals</b>				<b>1,464.82</b>	<b>2,258.78</b>		<b>7.12</b>			
SALESFORCE INC COM, CRM, 79466L302										
Sale	1.000	02/23/21	11/14/23	220.10	234.30			-14.20		
Sale	2.000	02/26/21	11/14/23	440.20	438.20			2.00		
Sale	3.000	03/03/21	11/14/23	660.29	627.00			33.29		
Sale	2.000	02/17/22	11/14/23	440.19	411.20			28.99		
<b>Subtotals</b>				<b>1,760.78</b>	<b>1,710.70</b>					
<b>TOTALS</b>				<b>3,225.60</b>	<b>3,969.48</b>	<b>0.00</b>	<b>7.12</b>		<b>0.00</b>	
								<b>64.28</b>		
								<b>-808.16</b>		

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FORM 1099-B\*

## 2023 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

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.

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 2023 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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# 2023 SUPPLEMENTAL INFORMATION

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## Details of 1099-DIV Transactions

### Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP									
Date	1a Total Ordinary Dividends (includes 1b, 2e & 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	2e Section 897 Ordinary Dividends	5 Section 199A Dividends	12 Exempt Interest Dividends	13 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
APPLE INC, AAPL, 037833100									
02/16/23	0.58			0.58					
05/18/23	1.08			1.08					
08/17/23	3.48			3.48					
11/16/23	5.89			5.89					
<b>Subtotals</b>	<b>11.03</b>			<b>11.03</b>					
CNA FINANCIAL CORP, CNA, 126117100									
03/09/23	8.26			8.26					
06/01/23	2.22			2.22					
08/31/23	2.25			2.25					
11/30/23	2.27			2.27					
<b>Subtotals</b>	<b>15.00</b>			<b>15.00</b>					
COSTCO WHOLESALE CORP COM USD0.01, COST, 22160K105									
02/17/23	0.91			0.91					
05/19/23	1.04			1.04					
09/08/23	1.04			1.04					
11/17/23	1.04			1.04					
<b>Subtotals</b>	<b>4.03</b>			<b>4.03</b>					
FIDELITY TREASURY MONEY MARKET FUND, FZFXX, 316341304									
01/31/23	47.39	47.39							
02/28/23	21.52	21.52							
03/31/23	8.81	8.81							
04/28/23	122.93	122.93							
05/31/23	55.16	55.16							
06/30/23	52.79	52.79							
07/31/23	52.81	52.81							







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## Details of 1099-DIV Transactions

### Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP									
Date	1a Total Ordinary Dividends (includes 1b, 2e & 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	2e Section 897 Ordinary Dividends	5 Section 199A Dividends	12 Exempt Interest Dividends	13 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
FIDELITY TREASURY MONEY MARKET FUND, FZFXX, 316341304									
08/31/23	43.53	43.53							
09/29/23	52.48	52.48							
10/31/23	49.41	49.41							
11/30/23	33.78	33.78							
12/29/23	97.56	97.56							
<b>Subtotals</b>	<b>638.17</b>	<b>638.17</b>							
HARTFORD FINANCIAL SERVICES GRP INC COM, HIG, 416515104									
01/04/23	0.44			0.44					
04/04/23	0.44			0.44					
07/05/23	0.44			0.44					
10/03/23	0.45			0.45					
<b>Subtotals</b>	<b>1.77</b>			<b>1.77</b>					
INTEL CORP COM USD0.001, INTC, 458140100									
03/01/23	274.66			274.66					
INVESCO EXCHANGE TRADED FD TR II KBW, KBWD, 46138E610									
01/27/23	96.41	57.76		10.58		28.07			
02/24/23	171.09	102.50		18.77		49.82			
03/24/23	236.67	141.80		25.97		68.90			
04/28/23	320.60	192.08		35.18		93.34			
05/26/23	405.63	243.03		44.51		118.09			
06/23/23	431.60	258.59		47.36		125.65			
07/28/23	651.47	390.32		71.49		189.66			
08/25/23	756.73	453.39		83.04		220.30			
09/22/23	635.36	380.67		69.72		184.97			
10/27/23	763.70	457.56		83.80		222.34			
11/24/23	791.81	474.41		86.89		230.51			



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## Details of 1099-DIV Transactions

### Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP									
Date	1a Total Ordinary Dividends (includes 1b, 2e & 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	2e Section 897 Ordinary Dividends	5 Section 199A Dividends	12 Exempt Interest Dividends	13 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
INVESCO EXCHANGE TRADED FD TR II KBW, KBWD, 46138E610									
12/22/23	763.24	457.29		83.75		222.20			
<b>Subtotals</b>	<b>6,024.31</b>	<b>3,609.40</b>		<b>661.06</b>		<b>1,753.85</b>			
-----									
NVIDIA CORPORATION COM, NVDA, 67066G104									
03/29/23	0.16			0.16					
06/30/23	0.16			0.16					
09/28/23	0.16			0.16					
12/28/23	0.16			0.16					
<b>Subtotals</b>	<b>0.64</b>			<b>0.64</b>					
-----									
<b>TOTALS</b>	<b>6,969.61</b>	<b>4,247.57</b>	<b>0.00</b>	<b>968.19</b>	<b>0.00</b>	<b>1,753.85</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

Short-term capital gain distributions reported on monthly/quarterly account statements are included in 1a Total Ordinary Dividends on Form 1099-DIV.

To see the 2023 State Percentages of Tax-Exempt Income for Fidelity Federal Tax-Exempt Funds or the Percentage of Income from U.S. Government Securities for applicable Fidelity Funds, visit [Fidelity.com/fundtaxinfo](https://www.fidelity.com/fundtaxinfo).





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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
AMAZON.COM INC, AMZN, 023135106								
RSU	39.000	06/15/23	06/15/23	4,915.55	4,925.54	4,925.54	0.00	-9.99
<b>Totals</b>				<b>4,915.55</b>		<b>4,925.54</b>		
				<b>Short-Term Adjusted Realized Gain</b>				<b>0.00</b>
				<b>Short-Term Adjusted Realized Loss</b>				<b>-9.99</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.



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### 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.

- (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.**

