



#BWNJGWM

VENKATARAO NELLURI &
PRAVEENA RANI MADALA JT TEN
49 GRAYHAWK WAY N
MECHANICSBURG PA 17050-8523



**1099 Consolidated Tax Statement
Tax Year 2023 - ORIGINAL**

Date Issued
January 10, 2024

Your Financial Advisor
MICHAEL ANDERSON
1350 BROADCASTING RD STE 100
WYOMISSING, PA 19610
610-478-4500

Account Number
716 060613 200

Account Mailing Address

Account Owner
VENKATARAO NELLURI &
PRAVEENA RANI MADALA JT TEN
49 GRAYHAWK WAY N
MECHANI CSBURG PA 17050-8523

Legal Name and Address Reported
to IRS and State Taxing Authorities
VENKATARAO NELLURI
49 GRAYHAWK WAY N
MECHANI CSBURG PA 17050

Customer Service: 866-324-6088

What's included in this packet:

Reportable to the IRS	Page
1099-DIV Dividends and Distributions.....	2
1099-INT Interest Income.....	2
1099-MISC Miscellaneous Income.....	2
1099-OID Original Issue Discount.....	2
1099-B Proceeds from Transactions.....	2
Details of 1099-INT Interest Income.....	4

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.*

TurboTax® and Lacerte® are registered trademarks of Intuit, Inc. H&R Block Tax Software® is a registered trademark of H&R Block, Inc.



***** 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.



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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-2058
Account Number: 716 060613 200

Name Reported to the IRS: VENKATARAO NELLURI
49 GRAYHAWK WAY N
MECHANICSBURG PA 17050

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
4. FEDERAL INCOME TAX WITHHELD	\$0.00
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	\$44,645.65
2. EARLY WITHDRAWAL PENALTY	\$0.00
3. INTEREST ON U.S. SAVINGS BONDS AND TREAS. OBLIGATIONS	\$0.00
4. FEDERAL INCOME TAX WITHHELD	\$0.00
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	\$0.00
4. FEDERAL INCOME TAX WITHHELD	\$0.00
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
4. FEDERAL INCOME TAX WITHHELD	\$0.00
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
4. FEDERAL INCOME TAX WITHHELD	\$0.00

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	01/06/23	\$0.03	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	02/28/23	\$0.07	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	03/31/23	\$0.06	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	04/28/23	\$0.04	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	05/31/23	\$0.06	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	06/30/23	\$0.08	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	07/31/23	\$0.04	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	08/31/23	\$0.05	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	09/29/23	\$0.09	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	10/31/23	\$0.06	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	11/30/23	\$0.09	\$0.00
MORGAN STANLEY PRIVATE BANK NA	061871976	12/29/23	\$8.29	\$0.00
MSBNA PREFERRED SAVINGS- QC	99YA78EB0	01/31/23	\$1,655.07	\$0.00
MSBNA PREFERRED SAVINGS- QC	99YA78EB0	02/28/23	\$1,506.62	\$0.00
MSBNA PREFERRED SAVINGS- QC	99YA78EB0	03/31/23	\$1,668.32	\$0.00
MSBNA PREFERRED SAVINGS- QC	99YA78EB0	04/28/23	\$1,706.81	\$0.00
MSBNA PREFERRED SAVINGS- QC	99YA78EB0	05/31/23	\$1,899.65	\$0.00
MSBNA PREFERRED SAVINGS- QC	99YA78EB0	06/30/23	\$1,861.49	\$0.00
MSBNA PREFERRED SAVINGS- QC	99YA78EB0	07/31/23	\$1,990.96	\$0.00
MSBNA PREFERRED SAVINGS- QC	99YA78EB0	08/31/23	\$2,076.21	\$0.00
MSBNA PREFERRED SAVINGS- QC	99YA78EB0	09/29/23	\$2,009.10	\$0.00
MSBNA PREFERRED SAVINGS- QC	99YA78EB0	10/31/23	\$2,076.21	\$0.00
MSBNA PREFERRED SAVINGS- QC	99YA78EB0	11/30/23	\$2,009.10	\$0.00
MSBNA PREFERRED SAVINGS- QC	99YA78EB0	12/29/23	\$1,641.40	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	01/31/23	\$1,655.07	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	02/28/23	\$1,506.62	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	03/31/23	\$1,668.32	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	04/28/23	\$1,706.81	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	05/31/23	\$1,899.65	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	06/30/23	\$1,861.49	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	07/31/23	\$1,990.96	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	08/31/23	\$2,076.21	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	09/29/23	\$2,009.10	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	10/31/23	\$2,076.21	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	11/30/23	\$2,009.10	\$0.00
MSPBNA PREFERRED SAVINGS- QC	99YA78GU6	12/29/23	\$2,076.21	\$0.00
Total Interest Income 1099-INT box 1			\$44,645.65	
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.

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