



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

# 2023 TAX REPORTING STATEMENT

NAVEEN ADITY DANTULURI

Account No. **Z07-952855** Customer Service: 800-544-6666  
 Recipient ID No. **\*\*\*-\*\*-4408** Payer's Fed ID Number: 04-3523567

eDelivered

NAVEEN ADITY DANTULURI  
 31256 SHORECREST DR  
 APT 24107  
 NOVI MI 48377-1185

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 .....	230.89	6 Investment Expenses .....	0.00
1b Qualified Dividends .....	50.34	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>54.53</b>	16 State Tax Withheld.....	0.00
5 Section 199A Dividends .....	0.65		

**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		

**\* 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.**



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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	0.00	0.00	0.00	0.00	0.00	0.00
Short-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
Long-term transactions for which basis is <u>reported</u> to the IRS	0.00	0.00	0.00	0.00	0.00	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
	0.00	0.00	0.00	0.00	0.00	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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## 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

NAVEEN ADITY DANTULURI

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Recipient ID No. **\*\*\*-\*\*-4408** Payer's Fed ID Number: 04-3523567

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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									
11/16/23	0.70			0.70					
COSTCO WHOLESALE CORP COM USD0.01, COST, 22160K105									
11/17/23	0.93			0.93					
FIDELITY GOVERNMENT MONEY MARKET, SPAXX, 31617H102									
01/31/23	16.83	16.83							
02/28/23	10.49	10.49							
03/31/23	4.10	4.10							
04/28/23	15.10	15.10							
05/31/23	22.43	22.43							
06/30/23	21.94	21.94							
07/31/23	22.92	22.92							
08/31/23	23.91	23.91							
09/29/23	23.25	23.25							
10/31/23	18.70	18.70							
11/30/23	0.10	0.10							
12/29/23	0.13	0.13							
<b>Subtotals</b>	<b>179.90</b>	<b>179.90</b>							
INTEL CORP COM USD0.001, INTC, 458140100									
12/01/23	1.81			1.81					
SPDR DOW JONES INDL AVERAGE ET UT SER 1, DIA, 78467X109									
03/13/23	2.44			2.44					
04/17/23	3.78			3.78					
05/15/23	0.81			0.81					
06/12/23	3.20			3.20					
07/17/23	3.42			3.42					





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SPDR DOW JONES INDL AVERAGE ET UT SER 1, DIA, 78467X109									
08/14/23	1.18			1.18					
09/11/23	2.25			2.25					
10/16/23	4.07			4.07					
11/13/23	0.83			0.83					
12/11/23	3.12			3.12					
01/16/24	3.67			3.67					
<b>Subtotals</b>	<b>28.77</b>			<b>28.77</b>					
VANGUARD INDEX FUNDS S&P 500 ETF USD, VOO, 922908363									
03/29/23	4.13			3.98		0.15			
07/05/23	4.38			4.22		0.16			
10/03/23	4.15			4.00		0.15			
12/26/23	5.00			4.81		0.19			
<b>Subtotals</b>	<b>17.66</b>			<b>17.01</b>		<b>0.65</b>			
VISA INC, V, 92826C839									
12/01/23	1.12			1.12					
<b>TOTALS</b>	<b>230.89</b>	<b>179.90</b>	<b>0.00</b>	<b>50.34</b>	<b>0.00</b>	<b>0.65</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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## Details of 1099-DIV Transactions

### Other Distributions, Tax and Expense Detail

Description, Symbol, CUSIP	3 Non Dividend Distribution	4 Federal Income Tax Withheld	14 State	16 State Tax Withheld	6 Investment Expenses (n)	9 Cash Liquidation Distribution	10 Noncash Liquidation Distribution
APPLE INC, AAPL, 037833100							
11/16/23		0.17					
-----							
COSTCO WHOLESALE CORP COM USD0.01, COST, 22160K105							
11/17/23		0.22					
-----							
FIDELITY GOVERNMENT MONEY MARKET, SPAXX, 31617H102							
01/31/23		4.04					
02/28/23		2.52					
03/31/23		0.98					
04/28/23		3.62					
05/31/23		5.38					
06/30/23		5.27					
07/31/23		5.50					
08/31/23		5.74					
09/29/23		5.58					
10/31/23		4.49					
11/30/23		0.02					
12/29/23		0.03					
<b>Subtotals</b>		<b>43.17</b>					
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INTEL CORP COM USD0.001, INTC, 458140100							
12/01/23		0.43					
-----							
SPDR DOW JONES INDL AVERAGE ET UT SER 1, DIA, 78467X109							
03/13/23		0.59					
04/17/23		0.91					
05/15/23		0.19					
06/12/23		0.77					
07/17/23		0.82					
08/14/23		0.28					
09/11/23		0.54					





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Description, Symbol, CUSIP	3 Non Dividend Distribution	4 Federal Income Tax Withheld	14 State	16 State Tax Withheld	6 Investment Expenses (n)	9 Cash Liquidation Distribution	10 Noncash Liquidation Distribution
SPDR DOW JONES INDL AVERAGE ET UT SER 1, DIA, 78467X109							
10/16/23		0.98					
11/13/23		0.20					
12/11/23		0.75					
<b>Subtotals</b>		<b>6.03</b>					
-----							
VANGUARD INDEX FUNDS S&P 500 ETF USD, VOO, 922908363							
03/29/23		0.99					
07/05/23		1.05					
10/03/23		1.00					
12/26/23		1.20					
<b>Subtotals</b>		<b>4.24</b>					
-----							
VISA INC, V, 92826C839							
12/01/23		0.27					
-----							
<b>TOTALS</b>	<b>0.00</b>	<b>54.53</b>			<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

Dividends and other distributions sometimes must be reclassified by the issuer. As a result, we may be required to send you a corrected Tax Reporting Statement that may affect the information you report on your tax return.

(n) Reported widely held fixed investment trust dividend amounts include expenses which were not distributed to trust holders. Those amounts are listed separately in **1a** Total ordinary dividends. The equivalent expense amounts are also detailed in the supplemental (1099-DIV) Other Distribution, Tax, and Expense Details, column **6**. Tax exempt interest dividend expenses are listed as separate entries in column **12** and in the separate Tax-Exempt Interest Expenses section shown later in this statement.

**Important Tax Return Document Enclosed.**

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