



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

2023 TAX REPORTING STATEMENT

AKSHAT VERMA

Account No. **Z08-503322** Customer Service: 800-544-6666
Recipient ID No. *****-**-8638** Payer's Fed ID Number: 04-3523567

eDelivered

AKSHAT VERMA
1301 CROSSING PL APT 711
AUSTIN TX 78741-2037

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	160.69	6 Investment Expenses	0.00
1b Qualified Dividends	136.19	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.	
4 Federal Income Tax Withheld	0.00	16 State Tax Withheld.....	0.00
5 Section 199A Dividends	4.05		

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
4 Federal Income Tax Withheld	0.00	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.	
4 Federal Income Tax Withheld	0.00	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	12.21	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

AKSHAT VERMA

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Recipient ID No. *****-**-8638** Payer's Fed ID Number: 04-3523567

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

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 GOVERNMENT MONEY MARKET, SPAXX, 31617H102									
01/31/23	1.95	1.95							
02/28/23	0.79	0.79							
03/31/23	3.12	3.12							
04/28/23	3.72	3.72							
05/31/23	4.06	4.06							
06/30/23	3.98	3.98							
07/31/23	1.82	1.82							
08/31/23	0.16	0.16							
09/29/23	0.16	0.16							
10/31/23	0.22	0.22							
11/30/23	0.22	0.22							
12/29/23	0.25	0.25							
Subtotals	20.45	20.45							
FIDELITY 500 INDEX FUND, FXAIX, 315911750									
04/05/23	18.20			17.82		0.38			
07/07/23	20.44			19.26		1.18			
10/06/23	19.06			17.96		1.10			
12/15/23	24.02			22.63		1.39			
Subtotals	81.72			77.67		4.05			
INVESCO EXCH TRADED FD TR II INVESCO, SOXQ, 46138G615									
03/24/23	2.16			2.16					
06/23/23	1.95			1.95					
09/22/23	1.79			1.79					
12/22/23	2.13			2.13					
Subtotals	8.03			8.03					





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SPDR DOW JONES INDL AVERAGE ET UT SER 1, DIA, 78467X109									
03/13/23	1.64			1.64					
04/17/23	2.55			2.55					
05/15/23	0.55			0.55					
06/12/23	2.16			2.16					
07/17/23	2.30			2.30					
08/14/23	0.80			0.80					
09/11/23	1.51			1.51					
10/16/23	2.74			2.74					
11/13/23	0.56			0.56					
12/11/23	2.10			2.10					
01/16/24	2.47			2.47					
Subtotals	19.38			19.38					

VANGUARD SPECIALIZED FUNDS DIV APP ETF, VIG, 921908844									
03/29/23	4.84			4.84					
07/05/23	4.99			4.99					
10/03/23	9.72			9.72					
12/27/23	11.56			11.56					
Subtotals	31.11			31.11					

TOTALS	160.69	20.45	0.00	136.19	0.00	4.05	0.00	0.00	0.00

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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Margin Interest Paid

Description	Date	Amount
MARGIN INTEREST @ 12.575% AVG	01/22/23	12.21
TOTAL		12.21

Important Tax Return Document Enclosed.

