

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

# 2023 TAX REPORTING STATEMENT

ARAVIND BABU JERIPOTHULA

Account No. **Z23-416048** Customer Service: 800-544-6666 Recipient ID No. \*\*\*-\*\*-**4306** Payer's Fed ID Number: 04-3523567

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

eDelivered

## ARAVIND BABU JERIPOTHULA 10550 NE 29TH ST APT C BELLEVUE WA 98004-2053

## Form 1099-DIV \*

#### 2023 Dividends and Distributions

1a Total Ordinary Dividends	0.00
1b Qualified Dividends	
2a Total Capital Gain Distributions	0.00
2b Unrecap. Sec 1250 Gain	0.00
2c Section 1202 Gain	0.00
2d Collectibles (28%) Gain	0.00
2e Section 897 Ordinary Dividends	0.00
2f Section 897 Capital Gain	0.00
3 Nondividend Distributions	0.00
4 Federal Income Tax Withheld	0.00
5 Section 199A Dividends	0.00

1 Interest Income ......0.00

7 Foreign Country or U.S. Possession .....

Investment Expenses	.00
Foreign Tax Paid0	.00
Foreign Country or U.S. Possession	
Cash Liquidation Distributions0.	
Non-Cash Liquidation Distributions0.	.00
Exempt Interest Dividends0.	.00
Specified Private Activity Bond Interest Dividends0.	.00
State	
State Identification No.	
State Tax Withheld0	.00

# Form 1099-INT \*

#### 2023 Interest Income

# 10 Market Discount 0.00 11 Bond Premium 0.00 12 Bond Premium on U.S. Treasury Obligations 0.00 13 Bond Premium on Tax-Exempt Bond 0.00 14 Tax-Exempt Bond CUSIP no. 15 State 16 State Identification No 0.00 17 State Tax Withheld 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.

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

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

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> Copy B for Recipient (OMB No. 1545-0115)

#### Form 1099-MISC \*

#### 2023 Miscellaneous Information

2 Royalties	0.00
3 Other Income	
4 Federal Income Tax Withheld	0.00
8 Substitute Payments in Lieu of Dividends or Interest	0.00

 16 State Tax Withheld
 0.00

 17 State/Payer's State No.
 0.00

 18 State Income
 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 reported to the IRS	0.00	0.00	0.00	0.00	0.00	0.00
Short-term transactions for which basis is not reported to the IRS	1,383.07	0.00	0.00	0.00	1,383.07	0.00
Long-term transactions for which basis is reported to the IRS	0.00	0.00	0.00	0.00	0.00	0.00
Long-term transactions for which basis is not reported 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
	1,383.07	0.00	0.00	0.00	1,383.07	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 on U.S. Treasury Obligations	0.00
Total Original Issue Discount on Tax-Exempt Obligations	

Total Original Issue Discount - REMIC ......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 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)

<b>1a</b> Description of Action	f property, Stock or Ott Quantity <b>1b</b> Da Acqu	ate	nbol, CUSIP 1 <b>c</b> Date Sold or Disposed	1d Proceeds	<b>1e</b> Cost or Other Basis (b)	<b>1f</b> Accrued Market Discount	<b>1g</b> Wash Sale Loss Disallowed	Gain/Loss (-)	4 Federal Income Tax Withheld	<b>14</b> State <b>16</b> State Ta Withhele
AMAZON.COM I	NC, AMZN, 02313510	6								
Sale	10.000 08	/15/23	08/15/23	1,383.07	0.00			1,383.07		
TOTALS				1,383.07	0.00	0.00	0.00		0.00	
	Box	c B Sh	ort-Term Realiz	ed Gain				1,383.07		
	Box	c B Sh	ort-Term Realiz	ed Loss				0.00		

(IRS Form 1099-B box numbers are shown below in **bold** type)

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
Tax Exempt Investment Expense	0.00
Accrued Interest Paid on Purchases	0.00
Proceeds Investment Expenses	
Severance Tax	
Administrative Expenses	0.00
Non-deductible Generic Expenses	
Deductible Generic Expenses	0.00

Currency Realized Gain/Loss (USD)	0.00
Actual Payment Shortfall	
Addition to Basis	
Account Fees	0.00
Short Dividends	0.00
Money Market Realized Gain/Loss	0.00
Short/Long Term Realized Gain/Loss	0.00
Mortgage Pool Statement (MBS)	0.00

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# **2023 SUPPLEMENTAL INFORMATION**

ARAVIND BABU JERIPOTHULA

Account No. **Z23-416048** Customer Service: 800-544-6666 Recipient ID No. \*\*\*-\*\*-**4306** Payer's Fed ID Number: 04-3523567

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

## **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**

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	C, AMZN, 023135106							
RSU	10.000	08/15/23	08/15/23	1,383.07	1,383.09	1,383.09	0.00	-0.02
		Totals		1,383.07 Short-Term Adjusted	Realized Gain	1,383.09		0.00
				Short-Term Adjusted	Realized Loss			-0.02
				Wash Sale Loss Disa	llowed		0.00	

(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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## **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.

- (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.

