



#BWNJGWM

BHUVANESWARI TAMMAREDDY  
205 CORONELLA DR  
LIBERTY HILL TX 78642

1099:001  
February 5, 2024  
913296978209  
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1099 Consolidated Tax Statement
Tax Year 2023 - ORIGINAL

Date Issued
February 05, 2024

Account Mailing Address

Account Owner
BHUVANESWARI TAMMAREDDY
205 CORONELLA DR
LIBERTY HILL TX 78642

Legal Name and Address Reported
to IRS and State Taxing Authorities
BHUVANESWARI TAMMAREDDY
205 CORONELLA DR
LIBERTY HILL TX 78642

Account Number
913 296978 209

Customer Service: 866-324-6088

What's included in this packet:

Table with 2 columns: Reportable to the IRS, Page. Includes items like 1099-DIV Dividends and Distributions (2), 1099-INT Interest Income (2), etc.

This E\*TRADE from 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 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 Forms 480.6A, 480.6B, 480.6C and 480.6D.

E\*TRADE from Morgan Stanley is pleased to provide you with the ability to download your tax information into the following individual tax preparation software applications: TurboTax® and H&R Block Tax Software®. To view gains and losses, simply go to the Gains & Losses page on etrade.com where you can find historical information for the current year and prior two years.

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

Warning box with CAUTION icon and text: \*\*\* WARNING - CORRECTED TAX FORMS POSSIBLE \*\*\* The Forms 1099 included in your E\*TRADE from 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.

Table with 2 columns: Non-Reportable to the IRS, Page. Includes Fees and Expenses (5).



from Morgan Stanley

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-1793
Account Number: 913 296978 209

Name Reported to the IRS: BHUVANESWARI TAMMAREDDY
205 CORONELLA DR
LIBERTY HILL TX 78642

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.

Table with 2 columns: Description and Amount. Includes sections for Dividends and Distributions, and Interest Income.

Table with 2 columns: Description and Amount. Includes sections for Miscellaneous Information, Original Issue Discount, and Proceeds from Broker and Barter Exchange Transactions.

IMPORTANT TAX INFORMATION -- PLEASE RETAIN FOR YOUR RECORDS





**1099-DIV DIVIDENDS & DISTRIBUTIONS**

**Ordinary Dividends**

DESCRIPTION	CUSIP	PAY DATE	ORDINARY DIVIDENDS	QUALIFIED DIVIDENDS	FEDERAL INCOME TAX WITHHELD	SECTION 199A DIVIDENDS
CHARLES SCHWAB NEW	808513105	11/24/23	\$0.25	\$0.25	\$0.00	\$0.00
COGNIZANT TECH SOLUTIONS CL A	192446102	11/30/23	\$73.95	\$73.95	\$0.00	\$0.00
<b>Total Ordinary Dividends</b> 1099-DIV box 1a			<b>\$74.20</b>			
<b>Total Qualified Dividends</b> 1099-DIV box 1b				<b>\$74.20</b>		
<b>Total Federal Income Tax Withheld</b> 1099-DIV box 4					<b>\$0.00</b>	
<b>Total Section 199A Dividends</b> 1099-DIV box 5						<b>\$0.00</b>

**FEES AND EXPENSES**

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**Fees**

<u>DATE</u>	<u>ACTIVITY</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
10/25/23	Charge	WIRED FUNDS FEE	\$(25.00)
<b>Total Fees</b>			<b>\$(25.00)</b>

Consult your tax advisor regarding whether these fees are deductible in your circumstances. If you received any advisory fee rebates, consult your tax advisor regarding the tax consequences to you of receiving those rebates, including whether they are taxable income to you and the effect, if any, of fees charged to you in other accounts with Morgan Stanley.

Margin interest information is provided for informational purposes only. To review details of interest charged, please refer to the Margin Loan Schedule on your monthly account statements.