



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

2023 TAX REPORTING STATEMENT

MEGHAL GUPTA

Account No. **Z08-870055** Customer Service: 800-544-6666
 Recipient ID No. *****-**-1656** Payer's Fed ID Number: 04-3523567

eDelivered

MEGHAL GUPTA
 630 VETERANS BLVD UNIT 275
 REDWOOD CITY CA 94063-1469

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	868.80	6 Investment Expenses	0.00
1b Qualified Dividends	830.11	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	32.69		

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		

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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	50.78	32.25	0.00	0.00	18.53	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	246.83	193.52	0.00	0.00	53.31	0.00
Long-term transactions for which basis is <u>not reported</u> to the IRS	11,597.69	0.00	0.00	0.00	11,597.69	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
	11,895.30	225.77	0.00	0.00	11,669.53	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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FORM 1099-B*

2023 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II
Proceeds are reported as **gross proceeds** unless otherwise indicated (a). (This Label is a Substitute for Boxes 2, 5, 6 & 12)

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

1a Description of property, Stock or Other Symbol, CUSIP										
Action	Quantity	1b Date Acquired	1c Date Sold or Disposed	1d Proceeds	1e Cost or Other Basis (b)	1f Accrued Market Discount	1g Wash Sale Loss Disallowed	Gain/Loss (-)	4 Federal Income Tax Withheld	14 State Tax Withheld
ORACLE CORP, ORCL, 68389X105										
Sale	1.328	10/22/21	07/13/23	156.09	129.40			26.69		
Sale	0.367	01/14/22	07/13/23	43.14	32.00			11.14		
Sale	0.405	04/19/22	07/13/23	47.60	32.12			15.48		
Subtotals				246.83	193.52					
TOTALS				246.83	193.52	0.00	0.00		0.00	
								53.31		
								0.00		

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FORM 1099-B*

2023 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II
Proceeds are reported as **gross proceeds** unless otherwise indicated (a). (This Label is a Substitute for Boxes 2, 5, 6 & 12)

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

1a Description of property, Stock or Other Symbol, CUSIP										
Action	Quantity	1b Date Acquired	1c Date Sold or Disposed	1d Proceeds	1e Cost or Other Basis (b)	1f Accrued Market Discount	1g Wash Sale Loss Disallowed	Gain/Loss (-)	4 Federal Income Tax Withheld	14 State Tax Withheld
ORACLE CORP, ORCL, 68389X105										
Sale	98.672	08/05/21	07/13/23	11,597.69	0.00(e)			11,597.69		
TOTALS				11,597.69	0.00	0.00	0.00	11,597.69	0.00	
								Box E Long-Term Realized Gain	11,597.69	
								Box E Long-Term Realized Loss	0.00	

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.
- (e) Your 1099-B reflects shares disposed of that were acquired through your employers stock plan. Cost basis associated with these shares may not have been adjusted for any compensation income that was associated with those shares in the year of acquisition or disposal. Please consult a tax advisor for the rules specific to your grant and plan. Refer to the Supplemental Stock Plan Service Lot Detail section of this form for additional detail. If there is no adjustment to basis, no Supplemental Stock Plan section will be included.

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	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

MEGHAL GUPTA

Account No. **Z08-870055** Customer Service: 800-544-6666

Recipient ID No. *****-**-1656** 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
APPLE INC, AAPL, 037833100									
02/16/23	1.80			1.80					
05/18/23	1.88			1.88					
08/17/23	1.89			1.89					
11/16/23	1.89			1.89					
Subtotals	7.46			7.46					

FIDELITY GOVERNMENT MONEY MARKET, SPAXX, 31617H102									
01/31/23	0.04	0.04							
02/28/23	0.10	0.10							
03/31/23	0.12	0.12							
04/28/23	0.16	0.16							
05/31/23	0.29	0.29							
06/30/23	0.29	0.29							
07/31/23	2.49	2.49							
08/31/23	0.01	0.01							
Subtotals	3.50	3.50							

INVESCO EXCH TRADED FD TR II S&P500 HDL, SPHD, 46138E362									
01/27/23	6.01	0.19		4.70		1.12			
02/24/23	6.09	0.19		4.77		1.13			
03/24/23	6.16	0.19		4.82		1.15			
04/28/23	6.21	0.19		4.86		1.16			
05/26/23	6.35	0.20		4.97		1.18			
06/23/23	6.56	0.20		5.14		1.22			
07/28/23	6.71	0.21		5.25		1.25			
08/25/23	6.92	0.21		5.42		1.29			
09/22/23	7.65	0.24		5.99		1.42			
10/27/23	7.59	0.23		5.94		1.42			
11/24/23	7.07	0.22		5.54		1.31			



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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
INVESCO EXCH TRADED FD TR II S&P500 HDL, SPHD, 46138E362									
12/22/23	7.34	0.23		5.75		1.36			
Subtotals	80.66	2.50		63.15		15.01			

INVESCO QQQ TR UNIT SER 1, QQQ, 46090E103									
10/31/23	25.33			25.33					
12/29/23	38.28			38.28					
01/15/24	10.22			10.22					
Subtotals	73.83			73.83					

ORACLE CORP, ORCL, 68389X105									
01/24/23	32.39			32.39					
04/24/23	40.48			40.48					
07/26/23	40.48			40.48					
Subtotals	113.35			113.35					

VANGUARD INDEX FUNDS S&P 500 ETF USD, VOO, 922908363									
03/29/23	60.04			57.87		2.17			
07/05/23	63.89			61.58		2.31			
10/03/23	165.21			159.24		5.97			
12/26/23	200.13			192.90		7.23			
Subtotals	489.27			471.59		17.68			

VANGUARD WHITEHALL FDS HIGH DIV YLD, VYM, 921946406									
03/23/23	17.19			17.19					
06/23/23	21.15			21.15					
09/21/23	19.09			19.09					
12/21/23	26.95			26.95					
Subtotals	84.38			84.38					





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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
VISA INC, V, 92826C839									
03/01/23	3.92			3.92					
06/01/23	3.93			3.93					
09/01/23	3.94			3.94					
12/01/23	4.56			4.56					
Subtotals	16.35			16.35					
TOTALS	868.80	6.00	0.00	830.11	0.00	32.69	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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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

Description of Property, Stock or Other Symbol, Cusip								
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
ORACLE CORP, ORCL, 68389X105								
	0.228	07/22/22	07/13/23	26.80	0.00	17.02	0.00	9.78
	0.204	07/22/22	07/13/23	23.98	0.00	15.23	0.00	8.75
Totals				50.78		32.25		
				Short-Term Adjusted Realized Gain				18.53
				Short-Term Adjusted Realized Loss				0.00
				Wash Sale Loss Disallowed			0.00	

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.

Long-Term Transactions

Description of Property, Stock or Other Symbol, Cusip								
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
ORACLE CORP, ORCL, 68389X105								
RSU	98.672	08/05/21	07/13/23	11,597.69	8,885.41	8,885.41	0.00	2,712.28
	1.328	10/22/21	07/13/23	156.09	0.00	129.40	0.00	26.69
	0.367	01/14/22	07/13/23	43.14	0.00	32.00	0.00	11.14
	0.405	04/19/22	07/13/23	47.60	0.00	32.12	0.00	15.48
Totals				11,844.52		9,078.93		
				Long-Term Adjusted Realized Gain				2,765.59
				Long-Term Adjusted Realized Loss				0.00
				Wash Sale Loss Disallowed			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.





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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.

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.
- (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.

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