



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

# 2023 TAX REPORTING STATEMENT

SUJANA MADDALI

Account No. **X85-992781** Customer Service: 800-544-6666  
 Recipient ID No. **\*\*\*-\*\*-1729** Payer's Fed ID Number: 04-3523567

eDelivered

SUJANA MADDALI  
 3103 DRURY LN  
 CARPENTERSVLE IL 60110-3458

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 .....	1,013.82	6 Investment Expenses .....	0.00
1b Qualified Dividends .....	404.41	7 Foreign Tax Paid.....	11.56
2a Total Capital Gain Distributions .....	815.88	8 Foreign Country or U.S. Possession.....	Various
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.....	80.01
2e Section 897 Ordinary Dividends .....	0.00	13 Specified Private Activity Bond Interest Dividends.....	14.32
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>0.00</b>	16 State Tax Withheld.....	0.00
5 Section 199A Dividends .....	3.40		

**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

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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
FIDELITY BLUE CHIP VALUE ETF, FBCV, 316092345									
03/22/23	29.10			29.10					
06/22/23	40.80			40.80					
09/20/23	38.70			38.70					
12/20/23	38.70			38.70					
<b>Subtotals</b>	<b>147.30</b>			<b>147.30</b>					
FIDELITY CAPITAL & INCOME, FAGIX, 316062108									
01/31/23	12.35	12.35							
02/28/23	11.37	11.37							
03/31/23	12.87	12.87							
04/28/23	12.42	12.42							
05/31/23	13.35	13.35							
06/30/23	11.63	11.63							
07/31/23	12.27	12.27							
08/31/23	12.38	12.38							
09/29/23	12.82	12.82							
10/31/23	13.84	13.84							
11/30/23	12.93	12.93							
12/21/23	9.13	9.13							
12/29/23	15.42	15.42							
<b>Subtotals</b>	<b>162.78</b>	<b>162.78</b>							
FIDELITY DISCIPLINED EQUITY, FDEQX, 316066208									
12/08/23	12.06			12.06					
FIDELITY FREEDOM 2030, FFFEX, 31617R704									
12/28/23	187.22	100.84	3.49	81.57		1.32			6.98





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FIDELITY FREEDOM 2040, FFFFX, 315792101									
12/28/23	73.23	10.46	3.31	58.52		0.94			4.58
FIDELITY GOVERNMENT MONEY MARKET, SPAXX, 31617H102									
01/31/23	9.01	9.01							
02/28/23	8.74	8.74							
03/31/23	10.01	10.01							
04/28/23	10.21	10.21							
05/31/23	11.12	11.12							
06/30/23	10.93	10.93							
07/31/23	11.53	11.53							
08/31/23	12.04	12.04							
09/29/23	11.77	11.77							
10/31/23	12.34	12.34							
11/30/23	12.01	12.01							
12/29/23	12.53	12.53							
<b>Subtotals</b>	<b>132.24</b>	<b>132.24</b>							
FIDELITY GROWTH DISCOVERY FUND, FDSVX, 31617F205									
08/11/23	2.04			2.04					
12/21/23	1.10			1.10					
<b>Subtotals</b>	<b>3.14</b>			<b>3.14</b>					
FIDELITY LEVERAGED COMPANY STOCK, FLVCX, 316389873									
09/08/23	15.76			15.76					
12/15/23	12.14			12.14					
<b>Subtotals</b>	<b>27.90</b>			<b>27.90</b>					
FIDELITY MUNICIPAL INCOME, FHIGX, 316089507									
01/31/23							6.54	1.15	
02/28/23							5.94	1.09	



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FIDELITY MUNICIPAL INCOME, FHIGX, 316089507									
03/31/23							6.70		1.24
04/28/23							6.47		1.22
05/31/23							6.75		1.27
06/30/23							6.54		1.23
07/31/23							6.81		1.24
08/31/23							6.80		1.24
09/29/23							6.62		1.17
10/31/23							7.00		1.22
11/30/23							6.81		1.14
12/29/23							7.03		1.11
<b>Subtotals</b>							<b>80.01</b>		<b>14.32</b>
-----									
FIDELITY TOTAL BOND, FTBFX, 31617K881									
01/31/23	15.40	15.40							
02/28/23	14.12	14.12							
03/31/23	15.41	15.41							
04/28/23	15.25	15.25							
05/31/23	15.94	15.94							
06/30/23	15.58	15.58							
07/31/23	16.37	16.37							
08/31/23	16.46	16.46							
09/29/23	16.21	16.21							
10/31/23	16.92	16.92							
11/30/23	16.47	16.47							
12/21/23	1.48	1.48							
12/29/23	16.94	16.94							
<b>Subtotals</b>	<b>192.55</b>	<b>192.55</b>							





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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
FIDELITY ZERO LARGE CAP INDEX FUND, FNILX, 315911628									
12/15/23	74.05	0.32		72.68		1.05			
12/27/23	1.35	0.02		1.24		0.09			
<b>Subtotals</b>	<b>75.40</b>	<b>0.34</b>		<b>73.92</b>		<b>1.14</b>			
<b>TOTALS</b>	<b>1,013.82</b>	<b>599.21</b>	<b>6.80</b>	<b>404.41</b>	<b>0.00</b>	<b>3.40</b>	<b>80.01</b>	<b>14.32</b>	<b>11.56</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).

### Total Capital Gains Distributions Detail

Description, Symbol, CUSIP						
Date	2a Total Capital Gain Distr. (m)	Capital Gain Distributions Subject to Applicable Rate	2b Unrecaptured Section 1250 Gain	2c Section 1202 Gain	2d Collectibles (28%) Gain	2f Section 897 Capital Gain
FIDELITY DISCIPLINED EQUITY, FDEQX, 316066208						
12/08/23		137.28	137.28			
FIDELITY FREEDOM 2040, FFFFX, 315792101						
05/12/23		16.51	16.51			
FIDELITY GROWTH DISCOVERY FUND, FDSVX, 31617F205						
08/11/23		139.19	139.19			
12/21/23		5.52	5.52			
<b>Subtotals</b>		<b>144.71</b>	<b>144.71</b>			



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## Details of 1099-DIV Transactions

### Total Capital Gains Distributions Detail

Description, Symbol, CUSIP						
Date	2a Total Capital Gain Distr. (m)	Capital Gain Distributions Subject to Applicable Rate	2b Unrecaptured Section 1250 Gain	2c Section 1202 Gain	2d Collectibles (28%) Gain	2f Section 897 Capital Gain
FIDELITY LEVERAGED COMPANY STOCK, FLVCX, 316389873						
09/08/23	365.13	365.13				
12/15/23	152.25	152.25				
<b>Subtotals</b>	<b>517.38</b>	<b>517.38</b>				
<b>TOTALS</b>	<b>815.88</b>	<b>815.88</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

(m) 2a Total Capital Gain includes 2b, 2c, 2d and 2f. The portion of Capital Gain Distributions is subject to Applicable Rate.







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## State/Local Tax-Exempt Income from Fidelity Funds

Description	CUSIP	Tax-Exempt Interest	State/Local Tax Exempt Interest	State/Local Taxable Interest
FIDELITY MUNICIPAL INCOME	316089507	80.01	##	##
<b>TOTALS</b>		<b>80.01</b>	<b>--</b>	<b>--</b>

## Calculate this amount using one of the Percentage of State Tax-Exempt Income letters, available online at [Fidelity.com/fundtaxinfo](https://www.fidelity.com/fundtaxinfo).



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## Foreign Income and Taxes Summary

*This schedule lists all income and foreign tax by country. Foreign income and tax from mutual funds is listed in a separate section with a country designation of "RIC"*

### RICs

Country	Security description	CUSIP	Dividends		Interest	Total Foreign Income	Foreign Tax Paid
			Nonqualified	Qualified			
<b>RIC</b>							
	FIDELITY FREEDOM 2030	31617R704	25.72	47.28	0.00	73.00	6.98
	FIDELITY FREEDOM 2040	315792101	4.04	31.51	0.00	35.55	4.58
<b>TOTAL RICs</b>			<b>29.76</b>	<b>78.79</b>	<b>0.00</b>	<b>108.55</b>	<b>11.56</b>

*Total Foreign Source Income utilizes the "Total" column for RICs which may not always be supplied.*

*N/A - Qualified Foreign Source Income utilizes the "Qualified" column for RICs which may not always be supplied.*

**Important Tax Return Document Enclosed.**

