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VI NAYA KUMAR VUPPALA
1757 WETTENHALL DR
VIRGINIA BEACH VA 23456

1099:001
February 5, 2024
215486722204
0





**1099 Consolidated Tax Statement
Tax Year 2023 - ORIGINAL**

Date Issued
February 05, 2024

Account Number
215 486722 204

Account Mailing Address

Account Owner
VI NAYA KUMAR VUPPALA
1757 WETTENHALL DR
VIRGINIA BEACH VA 23456

**Legal Name and Address Reported
to IRS and State Taxing Authorities**
VI NAYA KUMAR VUPPALA
1604 SPENCE GATE CIR
104
VIRGINIA BEACH VA 23456

Customer Service: 866-324-6088

What's included in this packet:

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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. It is further important to note that if your E*TRADE account was transferred to Morgan Stanley Smith Barney LLC in 2023 you may receive a separate 1099 consolidated tax statement from E*TRADE that covers activity in your account prior to the transfer, which is not included in this 1099 Consolidated Tax Statement. You and your tax advisor should consider and review both consolidated tax statements when preparing your 2023 income tax return. Please note there may be a slight timing difference in the availability of the two forms. For more information on what to expect, visit etrade.com/taxyear2023.

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 - 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.



**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-3608
Account Number: 215 486722 204

Name Reported to the IRS: VINAYA KUMAR VUPPALA
1604 SPENCE GATE CIR
104
VIRGINIA BEACH VA 23456

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.

IRS 2023 FORM 1099-DIV - DIVIDENDS AND DISTRIBUTIONS	
BOX OMB NO. 1545-0110	
1a. TOTAL ORDINARY DIVIDENDS	\$148.64
1b. QUALIFIED DIVIDENDS	\$148.64
2a. TOTAL CAPITAL GAIN DISTRIBUTIONS	\$0.00
2b. UNRECAP. SEC. 1250 GAIN	\$0.00
2d. COLLECTIBLES (28%) GAIN	\$0.00
2e. SECTION 897 ORDINARY DIVIDENDS	\$0.00
2f. SECTION 897 CAPITAL GAIN	\$0.00
3. NON-DIVIDEND DISTRIBUTIONS	\$0.00
4. FEDERAL INCOME TAX WITHHELD	\$0.00
5. SECTION 199A DIVIDENDS	\$0.00
6. INVESTMENT EXPENSES	\$0.00
7. FOREIGN TAX PAID	\$0.00
9. CASH LIQUIDATION DISTRIBUTIONS	\$0.00
10. NON-CASH LIQUIDATION DISTRIBUTIONS	\$0.00
12. EXEMPT-INTEREST DIVIDENDS	\$0.00
13. SPECIFIED PRIVATE ACTIVITY BOND INTEREST DIVIDENDS	\$0.00
IRS 2023 FORM 1099-INT - INTEREST INCOME	
BOX OMB NO. 1545-0112	
1. INTEREST INCOME	\$0.01
2. EARLY WITHDRAWAL PENALTY	\$0.00
3. INTEREST ON U.S. SAVINGS BONDS AND TREAS. OBLIGATIONS	\$0.00
4. FEDERAL INCOME TAX WITHHELD	\$0.00
5. INVESTMENT EXPENSES	\$0.00
6. FOREIGN TAX PAID	\$0.00
8. TAX-EXEMPT INTEREST	\$0.00
9. SPECIFIED PRIVATE ACTIVITY BOND INTEREST	\$0.00
10. MARKET DISCOUNT	\$0.00
11. BOND PREMIUM	\$0.00
12. BOND PREMIUM ON TREASURY OBLIGATIONS	\$0.00
13. BOND PREMIUM ON TAX-EXEMPT BOND	\$0.00
14. TAX-EXEMPT AND TAX CREDIT BOND CUSIP NO.	

IRS 2023 FORM 1099-MISC - MISCELLANEOUS INFORMATION	
BOX OMB NO. 1545-0115	
1. RENTS	\$0.00
2. ROYALTIES	\$0.00
3. OTHER INCOME	\$0.00
4. FEDERAL INCOME TAX WITHHELD	\$0.00
8. SUBSTITUTE PAYMENTS IN LIEU OF DIVIDENDS OR INTEREST	\$0.00
IRS 2023 FORM 1099-OID - ORIGINAL ISSUE DISCOUNT	
BOX OMB NO. 1545-0117	
1. ORIGINAL ISSUE DISCOUNT FOR 2023	\$0.00*
2. OTHER PERIODIC INTEREST	\$0.00
4. FEDERAL INCOME TAX WITHHELD	\$0.00
5. MARKET DISCOUNT	\$0.00
6. ACQUISITION PREMIUM	\$0.00
8. OID ON U.S. TREASURY OBLIGATIONS	\$0.00*
9. INVESTMENT EXPENSES	\$0.00
10. BOND PREMIUM	\$0.00
11. TAX-EXEMPT OID	\$0.00
*This may not be the correct figure to report on your income tax return. See instructions on the back.	
IRS 2023 FORM 1099-B - PROCEEDS FROM BROKER AND BARTER EXCHANGE TRANSACTIONS	
BOX OMB NO. 1545-0715	
1d. PROCEEDS	\$0.00
COVERED SECURITIES	\$0.00
NONCOVERED SECURITIES	\$0.00
1e. COST OR OTHER BASIS OF COVERED SECURITIES	\$0.00
1f. ACCRUED MARKET DISCOUNT	\$0.00
1g. WASH SALE LOSS DISALLOWED	\$0.00
4. FEDERAL INCOME TAX WITHHELD	\$0.00

IMPORTANT TAX INFORMATION -- PLEASE RETAIN FOR YOUR RECORDS



1099-DIV DIVIDENDS & DISTRIBUTIONS

Ordinary Dividends

<u>DESCRIPTION</u>	<u>CUSIP</u>	<u>PAY DATE</u>	<u>ORDINARY DIVIDENDS</u>	<u>QUALIFIED DIVIDENDS</u>	<u>FEDERAL INCOME TAX WITHHELD</u>	<u>SECTION 199A DIVIDENDS</u>
ELEVANCE HEALTH INC	036752103	09/22/23	\$74.32	\$74.32	\$0.00	\$0.00
ELEVANCE HEALTH INC	036752103	12/21/23	\$74.32	\$74.32	\$0.00	\$0.00
Total Ordinary Dividends 1099-DIV box 1a			\$148.64			
Total Qualified Dividends 1099-DIV box 1b				\$148.64		
Total Federal Income Tax Withheld 1099-DIV box 4					\$0.00	
Total Section 199A Dividends 1099-DIV box 5						\$0.00

1099-INT INTEREST INCOME

Interest Income

<u>DESCRIPTION</u>	<u>CUSIP</u>	<u>PAY DATE</u>	<u>AMOUNT</u>	<u>FEDERAL INCOME TAX WITHHELD</u>
MORGAN STANLEY BANK N.A.	061870903	12/29/23	\$0.01	\$0.00
Total Interest Income 1099-INT box 1			\$0.01	
Total Federal Income Tax Withheld 1099-INT box 4				\$0.00

The amount of tax-exempt interest paid to you must be reported on the applicable Form 1040, U.S. Individual Income Tax Return. The amount of tax-exempt AMT interest paid to you must be taken into account in computing the Alternative Minimum Tax reported on Form 1040.

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