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United States

Combined Tax Statement for Forms 1099 for tax year 2023

1099-B - Copy - For Recipient - OMB #1545-0715

1099-DIV - Copy B - For Recipient - OMB #1545-0110

For Form 1099-B, DIV, INT, MISC, OID, and Q: This is important tax information and is being furnished to the IRS. 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.

Recipient's TIN XXX-XX-6832

Account Number: 12369765222

2023 Form 1099-DIV, Dividends and Distributions

Payment Date	Rate	FX Rate	Total Distributions (USD)	Total Ordinary Dividends (USD) (Box 1a)	Total Qualified Dividends (USD) (Box 1b)	Federal Income Tax Withheld (USD) (Box 4)	Foreign Tax Paid (USD) (Box 7)	Foreign Country or U.S. Possession (Box 8)
31-Mar-23	\$0.240062 USD		74.29	74.29	74.29			
31-Mar-23	\$0.240062 USD		368.62	368.62	368.62			
15-Sep-23	\$0.131136 USD		239.38	239.38	239.38			
15-Sep-23	\$0.131136 USD		54.41	54.41	54.41			
Total (USD)			736.70	736.70	736.70			

For any questions in regards to the above transactions, please refer to the Participant Tax Guide under the Documents section of your account.

Instructions for Recipient Form 1099-DIV

Recipient's taxpayer identification number (TIN). For your protection, this form may show only the last four digits of your TIN (social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN)). However, the issuer has reported your complete TIN to the IRS.

Account number. This form may show an account or other unique number the payer assigned to distinguish your account.

Box 1a. Shows total ordinary dividends that are taxable. Include this amount on the "Ordinary dividends" line of Form 1040 or 1040-SR. Also report it on Schedule B (Form 1040), if required.

Box 1b. Shows the portion of the amount in box 1a that may be eligible for reduced capital gains rates. See the Instructions for Forms 1040 and 1040-SR for how to determine this amount and where to report.

The amount shown may be dividends a corporation paid directly to you as a participant (or beneficiary of a participant) in an employee stock ownership plan (ESOP). Report it as a dividend on your Form 1040 or 1040-SR but treat it as a plan distribution, not as investment income, for any other purpose.

Box 4. Shows backup withholding. A payer must backup withhold on certain payments if you did not give your TIN to the payer. See Form W-9 for information on backup withholding. Include this amount on your income tax return as tax withheld.

Box 7. Shows the foreign tax that you may be able to claim as a deduction or a credit on Form 1040 or 1040-SR. See the Instructions for Forms 1040 and 1040-SR.

Box 8. This box should be left blank if a RIC reported the foreign tax shown in box 7.

Nominees. If this form includes amounts belonging to another person, you are considered a nominee recipient. You must file Form 1099-DIV (with a Form 1096) with the IRS for each of the other owners to show their share of the income, and you must furnish a Form 1099-DIV to each. A spouse is not required to file a nominee return to show amounts owned by the other spouse. See the current General Instructions for Certain Information Returns.