



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

2023 TAX REPORTING STATEMENT

INDRADIP ADHIKARI

Account No. **Z26-150050** Customer Service: 800-544-6666
Recipient ID No. *****-**-6752** Payer's Fed ID Number: 04-3523567

eDelivered

INDRADIP ADHIKARI
9976 VERVAIN DR
EDEN PRAIRIE MN 55347-5033

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 | 0.00 | 6 Investment Expenses | 0.00 |
| 1b Qualified Dividends | 0.00 | 7 Foreign Tax Paid..... | 0.00 |
| 2a Total Capital Gain Distributions | 0.00 | 8 Foreign Country or U.S. Possession..... | |
| 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 | 0.00 | | |

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 | 3,856.01 | 3,455.45 | 0.00 | 0.00 | 400.56 | 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 |
| | 3,856.01 | 3,455.45 | 0.00 | 0.00 | 400.56 | 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

Short-term transactions for which basis is reported to the IRS --report on Form 8949 with Box A checked and/or Schedule D, Part I
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 | 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 |
|--|----------|------------------|--------------------------|-----------------|----------------------------|----------------------------|------------------------------|---------------|---------------------------------------|-----------------------|
| UNITEDHEALTH GROUP INC, UNH, 91324P102 | | | | | | | | | | |
| Sale | 0.988 | 07/01/23 | 09/05/23 | 476.44 | 427.39(e) | | | 49.05 | | |
| Sale | 3.000 | 07/01/23 | 09/05/23 | 1,446.67 | 1,297.74(e) | | | 148.93 | | |
| Sale | 4.000 | 07/01/23 | 09/07/23 | 1,932.90 | 1,730.32(e) | | | 202.58 | | |
| Subtotals | | | | 3,856.01 | 3,455.45 | | | | | |
| TOTALS | | | | 3,856.01 | 3,455.45 | 0.00 | 0.00 | | 400.56 | 0.00 |
| | | | | | | | | | Box A Short-Term Realized Gain | |
| | | | | | | | | | 400.56 | |
| | | | | | | | | | Box A Short-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

INDRADIP ADHIKARI

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Recipient ID No. *****-**-6752** Payer's Fed ID Number: 04-3523567

Note: This information is not reported to the IRS. It may assist you in tax return preparation.

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 |
| UNITEDHEALTH GROUP INC, UNH, 91324P102 | | | | | | | | |
| QSP | 0.988 | 07/01/23 | 09/05/23 | 476.44 | 47.48 | 474.87 | 0.00 | 1.57 |
| QSP | 3.000 | 07/01/23 | 09/05/23 | 1,446.67 | 144.18 | 1,441.92 | 0.00 | 4.75 |
| QSP | 4.000 | 07/01/23 | 09/07/23 | 1,932.90 | 192.24 | 1,922.56 | 0.00 | 10.34 |
| Totals | | | | 3,856.01 | | 3,839.35 | | |
| | | | | Short-Term Adjusted Realized Gain | | | | 16.66 |
| | | | | Short-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.

| 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.



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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.

- (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.

