



#BWNJGWM

SHANKAR M GUDI PALLI
1320 DEVONSHIRE RD
BUFFALO GROVE IL 60089



1099 Consolidated Tax Statement
Tax Year 2023 - ORIGINAL

Date Issued
February 05, 2024

Account Mailing Address

Account Owner
SHANKAR M GUDI PALLI
1320 DEVONSHI RE RD
BUFFALO GROVE IL 60089

Legal Name and Address Reported
to IRS and State Taxing Authorities
SHANKAR M GUDI PALLI
1320 DEVONSHI RE RD
BUFFALO GROVE IL 60089

Account Number
459 722315 201

Customer Service: 866-324-6088

What's included in this packet:

Table with 2 columns: Reportable to the IRS, Page. Rows include 1099-DIV Dividends and Distributions (2), 1099-INT Interest Income (2), 1099-MISC Miscellaneous Income (2), 1099-OID Original Issue Discount (2), 1099-B Proceeds from Transactions (2), Details of 1099-DIV Dividends and Distributions (4), Details of 1099-INT Interest Income (4).

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.

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.



from Morgan Stanley

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-9055
Account Number: 459 722315 201

Name Reported to the IRS: SHANKAR M GUDIPALLI
1320 DEVONSHIRE RD
BUFFALO GROVE IL 60089

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.

Table with 2 columns: Description and Amount. Includes sections for Dividends and Distributions, Interest Income, and Federal Income Tax Withheld.

Table with 2 columns: Description and Amount. Includes sections for Miscellaneous Information, Original Issue Discount, and Proceeds from Broker and Barter Exchange Transactions.

IMPORTANT TAX INFORMATION -- PLEASE RETAIN FOR YOUR RECORDS



1099-DIV DIVIDENDS & DISTRIBUTIONS

Ordinary Dividends

DESCRIPTION	CUSIP	PAY DATE	ORDINARY DIVIDENDS	QUALIFIED DIVIDENDS	FEDERAL INCOME TAX WITHHELD	SECTION 199A DIVIDENDS
DISCOVER FINCL SVCS	254709108	12/07/23	\$410.61	\$410.61	\$0.00	\$0.00
Total Ordinary Dividends 1099-DIV box 1a			\$410.61			
Total Qualified Dividends 1099-DIV box 1b				\$410.61		
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

DESCRIPTION	CUSIP	PAY DATE	AMOUNT	FEDERAL INCOME TAX WITHHELD
MORGAN STANLEY BANK N.A.	061870903	09/29/23	\$0.02	\$0.00
MORGAN STANLEY BANK N.A.	061870903	10/31/23	\$0.01	\$0.00
MORGAN STANLEY BANK N.A.	061870903	11/30/23	\$0.02	\$0.00
MORGAN STANLEY BANK N.A.	061870903	12/29/23	\$0.02	\$0.00
Total Interest Income 1099-INT box 1			\$0.07	
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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