

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

# **2023 TAX REPORTING STATEMENT**

SAI CHARAN REDD NALLAPU

Account No. **Z20-599446** Customer Service: 800-544-6666 Recipient ID No. \*\*\*-\*\*-1205 Payer's Fed ID Number: 04-3523567

eDelivered

SAI CHARAN REDD NALLAPU 1089 OVERTON ST FRISCO TX 75036-0973 Payer's Name and Address: NATIONAL FINANCIAL SERVICES LLC 499 WASHINGTON BLVD JERSEY CITY, NJ 07310

Form 1099-DIV *	2023 Dividends and I	Distributions	Copy B for Recipient (OMB No. 1545-0110)
1a Total Ordinary Dividends  1b Qualified Dividends  2a Total Capital Gain Distributions  2b Unrecap. Sec 1250 Gain  2c Section 1202 Gain  2d Collectibles (28%) Gain  2e Section 897 Ordinary Dividends  2f Section 897 Capital Gain  3 Nondividend Distributions  4 Federal Income Tax Withheld		6 Investment Expenses	
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. Obligati	ions0.00	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		17 State Tax Withheld	0.00
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 Miscellaneo	2023 Miscellaneous Information			
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			
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 reported to the IRS	0.00	0.00	0.00	0.00	0.00	0.00	
Short-term transactions for which basis is not reported to the IRS	2,400.05	0.00	0.00	0.00	2,400.05	0.00	
Long-term transactions for which basis is reported to the IRS	0.00	0.00	0.00	0.00	0.00	0.00	
Long-term transactions for which basis is not reported 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	
	2,400.05	0.00	0.00	0.00	2,400.05	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	Total Original Issue Discount - REMIC					
Total Original Issue Discount on Tax-Exempt Obligations	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 <u>is not reported</u> to the IRS --report on Form 8949 with Box B 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)

Action	Quantity <b>1b</b> Date Acquired	<b>1c</b> Date Sold or Disposed	1d Proceeds	<b>1e</b> Cost or Other Basis (b)	1f Accrued Market Discount	<b>1g</b> Wash Sale Loss Disallowed	Gain/Loss (-)	4 Federal Income Tax Withheld	14 State 16 State Tax Withheld
AMAZON.COM I	NC, AMZN, 023135106								
Sale	18.000 08/23/2	23 08/23/23	2,400.05	0.00			2,400.05		
TOTALS			2,400.05	0.00	0.00	0.00		0.00	
	Box B	Short-Term Realized	d Gain				2,400.05		
	Box B	Short-Term Realized	d Loss				0.00		

For any transaction listed on Form 1099-B in a section indicating that "basis <u>is reported</u> 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 <u>is not reported</u> 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, 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.

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		Actual Payment Shortfall			
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

SAI CHARAN REDD NALLAPU

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0.00

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 Prope	erty, Stock or Other Syml	bol, 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
AMAZON.COM INC	C, AMZN, 023135106							
RSU	18.000	08/23/23	08/23/23	2,400.05	2,400.07	2,400.07	0.00	-0.02
		Totals		2,400.05		2,400.07		
				Short-Term Adjusted	Realized Gain			0.00
				Short-Term Adjusted	Realized Loss			-0.02

Wash Sale Loss Disallowed

(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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#### **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.

- 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.
- 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.

