



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

2023 TAX REPORTING STATEMENT

VIVEK S SHAH

Account No. **X83-490789** Customer Service: 800-544-4442
Recipient ID No. *****-**-7440** Payer's Fed ID Number: 04-3523567

eDelivered

VIVEK S SHAH
20 FARMHAVEN AVE
EDISON NJ 08820-3237

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 Dividends3,695.85
1b Qualified Dividends3,548.41
2a Total Capital Gain Distributions0.00
2b Unrecap. Sec 1250 Gain0.00
2c Section 1202 Gain0.00
2d Collectibles (28%) Gain0.00
2e Section 897 Ordinary Dividends0.00
2f Section 897 Capital Gain0.00
3 Nondividend Distributions0.00
4 Federal Income Tax Withheld0.00
5 Section 199A Dividends89.08

6 Investment Expenses0.00
7 Foreign Tax Paid0.00
8 Foreign Country or U.S. Possession0.00
9 Cash Liquidation Distributions0.00
10 Non-Cash Liquidation Distributions0.00
12 Exempt Interest Dividends0.00
13 Specified Private Activity Bond Interest Dividends0.00
14 State0.00
15 State Identification No.0.00
16 State Tax Withheld0.00

Form 1099-INT *

2023 Interest Income

Copy B for Recipient
(OMB No. 1545-0112)

1 Interest Income278.92
2 Early Withdrawal Penalty0.00
3 Interest on U.S. Savings Bonds and Treas. Obligations0.00
4 Federal Income Tax Withheld0.00
5 Investment Expenses0.00
6 Foreign Tax Paid0.00
7 Foreign Country or U.S. Possession0.00
8 Tax-Exempt Interest0.00
9 Specified Private Activity Bond Interest0.00

10 Market Discount0.00
11 Bond Premium0.00
12 Bond Premium on U.S. Treasury Obligations0.00
13 Bond Premium on Tax-Exempt Bond0.00
14 Tax-Exempt Bond CUSIP no.0.00
15 State0.00
16 State Identification No.0.00
17 State Tax Withheld0.00

*** 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 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 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	0.00	0.00	0.00	0.00	0.00	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
	0.00	0.00	0.00	0.00	0.00	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 on U.S. Treasury Obligations	0.00
Total Original Issue Discount on Tax-Exempt Obligations	0.00
Total Original Issue Discount - REMIC	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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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

VIVEK S SHAH

Account No. **X83-490789** Customer Service: 800-544-4442

Recipient ID No. *****-**-7440** Payer's Fed ID Number: 04-3523567

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Details of 1099-DIV Transactions

Total Ordinary Dividends and Distributions Detail

Description, Symbol, CUSIP									
Date	1a Total Ordinary Dividends (includes 1b, 2e & 5)	Dividend Distributions	Short-Term Capital Gains	1b Qualified Dividends	2e Section 897 Ordinary Dividends	5 Section 199A Dividends	12 Exempt Interest Dividends	13 Specified Private Activity Bond Interest Dividends	7 Foreign Tax Paid
DISCOVER FINANCIAL SERVICES, DFS, 254709108									
03/09/23	195.00			195.00					
06/08/23	227.50			227.50					
09/07/23	227.50			227.50					
12/07/23	227.50			227.50					
Subtotals	877.50			877.50					
GLOBAL X FDS RBTCS ARTFL INTE, BOTZ, 37954Y715									
07/10/23	5.32			5.32					
01/08/24	0.41			0.41					
Subtotals	5.73			5.73					
JPMORGAN CHASE & CO, JPM, 46625H100									
01/31/23	50.00			50.00					
04/30/23	50.00			50.00					
07/31/23	50.00			50.00					
10/31/23	52.50			52.50					
Subtotals	202.50			202.50					
MASTERCARD INCORPORATED CL A, MA, 57636Q104									
02/09/23	5.70			5.70					
05/09/23	5.70			5.70					
08/09/23	5.70			5.70					
11/09/23	5.70			5.70					
Subtotals	22.80			22.80					
MICROSOFT CORP, MSFT, 594918104									
03/09/23	6.80			6.80					
06/08/23	6.80			6.80					





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MICROSOFT CORP, MSFT, 594918104									
09/14/23	6.80			6.80					
12/14/23	7.50			7.50					
Subtotals	27.90			27.90					
MORGAN STANLEY COM USD0.01, MS, 617446448									
02/15/23	77.50			77.50					
05/15/23	77.50			77.50					
08/15/23	85.00			85.00					
11/15/23	85.00			85.00					
Subtotals	325.00			325.00					
PROSHARES ULTRAPRO QQQ, TQQQ, 74347X831									
09/27/23	9.71	7.91		1.80					
12/28/23	15.64	12.74		2.90					
Subtotals	25.35	20.65		4.70					
SPDR S&P500 ETF TRUST TRUST UNIT, SPY, 78462F103									
04/28/23	501.57	8.56		472.78		20.23			
07/31/23	545.58	9.31		514.27		22.00			
10/31/23	527.20	9.00		496.94		21.26			
01/31/24	634.72	10.84		598.29		25.59			
Subtotals	2,209.07	37.71		2,082.28		89.08			
TOTALS	3,695.85	58.36	0.00	3,548.41	0.00	89.08	0.00	0.00	0.00

Short-term capital gain distributions reported on monthly/quarterly account statements are included in **1a** Total Ordinary Dividends on Form 1099-DIV.

To see the **2023** State Percentages of Tax-Exempt Income for Fidelity Federal Tax-Exempt Funds or the Percentage of Income from U.S. Government Securities for applicable Fidelity Funds, visit [Fidelity.com/fundtaxinfo](https://www.fidelity.com/fundtaxinfo).



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Details of 1099-INT Transactions

Interest Income Details, Taxable Obligations

Description, Symbol, CUSIP						
Date	1 Interest Income	6 Foreign Tax Paid	11 Bond Premium	Noncovered Bond Premium	10 Market Discount	Noncovered Market Discount
CASH, FCASH, 315994103						
01/31/23	68.11					
02/28/23	66.25					
03/31/23	39.92					
04/28/23	15.32					
05/31/23	17.90					
06/30/23	17.92					
07/31/23	17.50					
08/31/23	7.42					
09/29/23	7.69					
10/31/23	8.11					
11/30/23	9.25					
12/29/23	3.53					
Subtotals	278.92					
TOTALS	278.92	0.00	0.00	0.00	0.00	0.00

Important Tax Return Document Enclosed.

