



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

2024 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 *

2024 Dividends and Distributions

Copy B for Recipient
(OMB No. 1545-0110)

1a Total Ordinary Dividends4,123.99
1b Qualified Dividends3,652.90
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 Dividends0.00

6 Investment Expenses0.00
7 Foreign Tax Paid.....0.00
8 Foreign Country or U.S. Possession.....0.00
9 Cash Liquidation Distributions.....0.00
10 Non-Cash Liquidation Distributions.....0.00
12 Exempt Interest Dividends0.00
13 Specified Private Activity Bond Interest Dividends.....0.00
14 State.....0.00
15 State Identification No.0.00
16 State Tax Withheld.....0.00

Form 1099-INT *

2024 Interest Income

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

1 Interest Income631.81
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 Bond.....0.00
14 Tax-Exempt Bond CUSIP no.0.00
15 State.....0.00
16 State Identification No0.00
17 State Tax Withheld.....0.00

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Form 1099-MISC *		2024 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 2024 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	3,793.27	2,984.79	0.00	0.00	808.48	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	74,184.61	46,618.42	0.00	0.00	27,566.19	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
	77,977.88	49,603.21	0.00	0.00	28,374.67	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 2024 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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FORM 1099-B* 2024 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										
Action	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
PROSHARES ULTRAPRO QQQ, TQQQ, 74347X831										
Sale	70.000	07/24/23	04/26/24	3,793.27	2,984.79			808.48		
TOTALS				3,793.27	2,984.79	0.00	0.00		0.00	
Box A Short-Term Realized Gain								808.48		
Box A Short-Term Realized Loss								0.00		

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FORM 1099-B* 2024 Proceeds from Broker and Barter Exchange Transactions Copy B for Recipient OMB No. 1545-0715

Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II
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										
Action	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
DISCOVER FINANCIAL SERVICES, DFS, 254709108										
Sale	100.000	03/23/20	08/02/24	12,821.64	2,589.00			10,232.64		
Sale	100.000	03/24/20	08/02/24	12,821.64	3,273.85			9,547.79		
Sale	25.000	04/07/20	08/02/24	3,205.41	942.50			2,262.91		
Sale	50.000	04/09/20	08/02/24	6,410.82	2,080.00			4,330.82		
Sale	25.000	06/11/20	08/02/24	3,205.41	1,230.00			1,975.41		
Sale	25.000	08/13/21	08/02/24	3,205.42	3,386.38			-180.96		
Subtotals				41,670.34	13,501.73					
DISNEY WALT CO COM, DIS, 254687106										
Sale	50.000	03/10/20	08/02/24	4,485.12	5,375.00			-889.88		
Sale	50.000	03/24/20	08/02/24	4,485.12	4,933.41			-448.29		
Sale	50.000	11/16/20	08/02/24	4,485.13	7,167.50			-2,682.37		
Subtotals				13,455.37	17,475.91					
ETF SER SOLUTIONS USGLB JETS, JETS, 26922A842										
Sale	100.000	11/16/20	01/31/24	1,880.45	2,090.00			-209.55		
GLOBAL X FDS RBTCS ARTFL INTE, BOTZ, 37954Y715										
Sale	100.000	08/08/18	01/31/24	2,864.98	2,225.67			639.31		
LEMONADE INC COM, LMND, 52567D107										
Sale	5.000	01/08/21	02/05/24	76.16	752.50			-676.34		

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FORM 1099-B*

2024 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II
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										
Action	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
MGM RESORTS INTERNATIONAL COM USD0.01, MGM, 552953101										
Sale	100.000	03/23/20	08/02/24	3,528.90	950.00			2,578.90		
Sale	25.000	04/07/20	08/02/24	882.23	356.25			525.98		
Sale	25.000	04/09/20	08/02/24	882.23	391.00			491.23		
Sale	50.000	11/16/20	08/02/24	1,764.45	1,348.50			415.95		
Sale	50.000	10/15/21	08/02/24	1,764.44	2,407.97			-643.53		
Subtotals				8,822.25	5,453.72					
ON SEMICONDUCTOR CORP COM USD0.01, ON, 682189105										
Sale	20.000	06/21/22	11/19/24	1,332.18	1,054.00			278.18		
UNITED AIRLS HLDGS INC COM, UAL, 910047109										
Sale	50.000	06/11/20	08/02/24	2,041.44	1,650.00			391.44		
Sale	50.000	12/09/20	08/02/24	2,041.44	2,414.89			-373.45		
Subtotals				4,082.88	4,064.89					
TOTALS				74,184.61	46,618.42	0.00	0.00			
				Box D Long-Term Realized Gain				33,670.56		
				Box D Long-Term Realized Loss				-6,104.37		

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FORM 1099-B*

2024 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB No. 1545-0715

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, option premium, and WHFIT related adjustments.

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 2024 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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2024 SUPPLEMENTAL INFORMATION

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

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									
03/07/24	227.50			227.50					
06/06/24	227.50			227.50					
Subtotals	455.00			455.00					
DISNEY WALT CO COM, DIS, 254687106									
01/10/24	45.00			45.00					
07/25/24	67.50			67.50					
Subtotals	112.50			112.50					
FIDELITY GOVERNMENT MONEY MARKET, SPAXX, 31617H102									
11/29/24	218.88	218.88							
12/31/24	229.90	229.90							
Subtotals	448.78	448.78							
JPMORGAN CHASE & CO. COM, JPM, 46625H100									
01/31/24	52.50			52.50					
04/30/24	57.50			57.50					
07/31/24	57.50			57.50					
10/31/24	62.50			62.50					
Subtotals	230.00			230.00					
MASTERCARD INCORPORATED CL A, MA, 57636Q104									
02/09/24	6.60			6.60					
05/09/24	6.60			6.60					
08/09/24	6.60			6.60					
11/08/24	6.60			6.60					
Subtotals	26.40			26.40					





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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
META PLATFORMS INC CLASS A COMMON STOCK, META, 30303M102									
03/26/24	5.00			5.00					
06/26/24	5.00			5.00					
09/26/24	5.00			5.00					
12/27/24	10.00			10.00					
Subtotals	25.00			25.00					
MICROSOFT CORP, MSFT, 594918104									
03/14/24	15.00			15.00					
06/13/24	15.00			15.00					
09/12/24	15.00			15.00					
12/12/24	26.56			26.56					
Subtotals	71.56			71.56					
MORGAN STANLEY COM USD0.01, MS, 617446448									
02/15/24	85.00			85.00					
05/15/24	85.00			85.00					
08/15/24	92.50			92.50					
11/15/24	92.50			92.50					
Subtotals	355.00			355.00					
PROSHARES ULTRAPRO QQQ, TQQQ, 74347X831									
03/27/24	15.06	12.24		2.82					
12/31/24	12.39	10.07		2.32					
Subtotals	27.45	22.31		5.14					
SPDR S&P500 ETF TRUST TRUST UNIT, SPY, 78462F103									
04/30/24	531.11			531.11					
07/31/24	585.75			585.75					
10/31/24	581.26			581.26					



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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
SPDR S&P500 ETF TRUST TRUST UNIT, SPY, 78462F103									
01/31/25	674.18			674.18					
Subtotals	2,372.30			2,372.30					
TOTALS	4,123.99	471.09	0.00	3,652.90	0.00	0.00	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 2024 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						
01/31/24	1.84					
02/29/24	12.17					
03/28/24	15.09					
04/30/24	14.80					
05/31/24	25.43					
06/28/24	25.17					
07/31/24	26.23					
08/30/24	158.00					
09/30/24	171.50					
10/31/24	161.39					
11/29/24	20.19					
Subtotals	631.81					
TOTALS	631.81	0.00	0.00	0.00	0.00	0.00

Important Tax Return Document Enclosed.

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