



1099 Consolidated Tax Statement
Tax Year 2021 - ORIGINAL


Name Reported to the IRS: **Account Owner**
JACK ANDERSON
1234 MAIN STREET
DALLAS, TX 75202

This Morgan Stanley 1099 Consolidated Tax Statement for 2021 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 Account Number reflected on your 1099 Forms is reflected as of December 31, 2021. If your Account Number subsequently changes after December 31, 2021, your new Account Number is reflected on your next scheduled statement once the Account Number change becomes effective.

The following tax forms are not included in this statement and are sent individually in separate mailings, if required: 1099-Q, 1042-S, 2439, 5498, 5498-ESA, REMIC, Schedule K-1 and Puerto Rico 480.6A, B, C & D.

Morgan Stanley is pleased to provide you with the ability to download your tax information into the following individual tax preparation software applications: **TurboTax®**, **H&R Block Tax Software®**, **Lacerte®** and **ProSystem fx®**. You also have the ability to download Realized Gain/Loss transactions into Microsoft Excel® from Morgan Stanley Online. *You must be registered with Morgan Stanley Online to take advantage of these features. To enroll in Morgan Stanley Online, visit www.morganstanley.com/online.*

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***** WARNING - CORRECTED TAX FORMS POSSIBLE *****

The Forms 1099 included in your 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 Consolidated Tax Statement. In that case, we are required to send you one or more corrections.

As permitted under Internal Revenue Code, Morgan Stanley will not issue a corrected Form 1099 if the total correction for the form is \$100 or less ("de minimis amounts"). For more information on the de minimis safe harbor rules, to elect to opt-out and receive a corrected Form 1099 for de minimis amounts, or to revoke a prior election to opt-out, please contact your Financial Advisor.

Date Issued
February 28, 2022

Account Number
123 445566 123

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Your Financial Advisor
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MORRISTOWN, NJ 07962
973-267-4545

Customer Service: 866-324-6088

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