

January 13, 2025

572-210 ATXETD 0306070850
OFER GAL C/F
TOMER GAL UTMA/IL
UNTIL AGE 21
144 GOLFVIEW TERRACE
BUFFALO GROVE IL 60089

ACCOUNT NUMBER: 572-XXX220

PLEASE REVIEW | 2024 FORM 1099 NOT ISSUED FOR YOUR ACCOUNT

E*TRADE from Morgan Stanley values you as a client and is committed to providing you with important information related to your account.

What you need to know:

According to IRS regulations, broker-dealers are not required to issue a Form 1099 for accounts that have not met certain minimum income thresholds. The above-noted account did not meet the minimum reporting threshold for the 2024 tax year and therefore will not receive a 2024 Form 1099.

Additional Information:

The minimum reporting thresholds for each Form 1099 that are included in the Form 1099 Consolidated Tax Statement are below:

NAME	MINIMUM REPORTING THRESHOLD
Form 1099-B	No minimum (sale of any reportable security amount will generate a Form 1099-B)
Form 1099-INT	At least \$10.00
Form 1099-OID	At least \$10.00
Form 1099-DIV	At least \$10.00 for all non-liquidation distributions, at least \$600.00 for liquidation distributions (boxes 9 and 10)
Form 1099-MISC	At least \$10.00 for Royalties (box 2) or Substitute Payments in Lieu of Dividends or Tax-Exempt Interest (box 8); or at least \$600.00 for all other boxes

Please note: These broker-dealer minimum reporting thresholds are distinct from taxpayer reporting requirements. Amounts not reported on Form 1099 may still need to be reported on your tax return.

Thank you for the opportunity to serve your financial needs.

Morgan Stanley Smith Barney LLC and its affiliates do not provide tax advice, and you always should consult your own tax advisor regarding your personal circumstances before taking any action that may have tax consequences.

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