

APPLICATION FOR RENTAL

Rental Application for **The Copper**

Notice: All adult applicants (18 years or older) must complete a separate application for rental.

APPLICANT INFORMATION			
LAST NAME Changani		FIRST NAME Mohit	M.I. K.
SSN ***-**-****		BIRTH DATE 1/5/1999	PHONE - TYPE (475) 223 - 8838 - Mobile
EMAIL mhtchangani@gmail.com			
CURRENT ADDRESS			
STREET ADDRESS 250 East 39th Street, Apt 3D		CITY New York	STATE NY
DATE IN		DATE OUT current	MONTHLY RENT \$2,800.00 / Mo.
EMPLOYMENT & INCOME INFORMATION			
OCCUPATION Business Development Analyst		EMPLOYER/COMPANY Gigapower	
SUPERVISOR Pamit Surana		SUPERVISOR PHONE (917) 747 - 4822	SALARY \$95,000.00/Yr.
EMPLOYER ADDRESS 311 S. Akard, 21st Floor		CITY Dallas	STATE TX
ZIP 75202			
BACKGROUND INFORMATION			
Have you ever filed for bankruptcy? NO		Have you ever willfully refused to pay rent when due? NO	
Have you ever been evicted from a tenancy or left owing money? NO		Have you ever been convicted of a crime? NO	
SUPPLEMENTAL QUESTIONS			
Will the tenant be receiving stove knob covers from property? ☒ No, I do not want stove knob covers for my stove. There is no child under age six residing in my apartment.			
Window Guards: ☒ No children 10 years of age or younger live in my apartment			
Were you referred by a broker? NO			
I (we) have seen the actual apartment for which I (we) are applying?: NO			
Preferred Mailing Address: 250 East 39th Street, Apt 3D, New York, NY 10016 - US			

APPLICATION CONSENT

I hereby warrant that all statements set forth above are true.

I understand that a consumer report and/or an investigative consumer report may be requested in connection with my prospective or continuing housing or guarantor application with **The Copper** through RP On-Site LLC (On-Site). I understand that these reports may include information concerning my character, employment and income verification, general reputation, personal characteristics, public records information, criminal records information, education, qualifications, motor vehicle record, mode of living, credit and indebtedness information, and any other information which may reflect upon my potential for tenancy or guarantor status gathered from any individual, organization, entity, agency, or other source which may have knowledge concerning any such items of information.

I understand that **The Copper** may require income and employment verification in connection with my application. I further understand that income and employment verification require access to my employment, income, and payroll related information. I authorize and consent to the access to, use, and release of such information by On-Site, Trans Union LLC, and other applicable credit bureaus for the purpose of providing the verification services in relation to my application and during the course of any ongoing lease obligation arising from such application.

I understand that if an investigative consumer report is requested about me, I have the right to make a written request to **The Copper** within a reasonable period of time, for complete and accurate disclosure of the nature and scope of the investigation requested.

I consent to the delivery of all notices or disclosures required by law via any medium so chosen by **The Copper** or On-Site, including but not limited to email or other electronic transmission. I understand that all notices shall be deemed received upon being sent.

By submitting this application, I certify that I have read and fully understand the disclosures and my rights detailed above and authorize On-Site to obtain, for the purpose of determining my eligibility for initial or continued tenancy or guarantor status, a consumer report and/or investigative consumer report and to disclose all information obtained by On-Site to **The Copper**, its affiliates, and assigns now and in the future. I also certify that I have read and fully understand my rights under the FCRA available at <https://www.on-site.com/resources/consent/fcraDisclosuresConsent.pdf>.

I understand that, upon written request, I will be informed whether or not a consumer report or an investigative consumer report was requested and, if such a report was requested, informed of the name and address of the credit reporting agency that furnished the report. With regard to "investigative consumer reports", I further understand that when I receive the name and address of the consumer reporting agency, I may request a copy of such report by contacting such agency. I acknowledge that I have received and read Article 23-A of the New York Correction Law (<https://www.on-site.com/resources/consent/correctionLawArticle23a.pdf>)

☒ Application consent was digitally accepted by Mohit K. Changani



Signed by Mohit K. Changani

Sat Aug 17 2024 11:01:52 PM EDT

Key: E904C531; IP Address: 207.38.135.40

Mohit K. Changani (Applicant)

Date

The following charge(s) will appear on your card statement as "ClickPay"

Application Fee - Charge Details

Name on Card	Account Number	Reference Number	Authorized
Mohit Changani	XXXXXXXXXXXX8385	14968190	\$21.50

This card has been authorized for the amount above and will be charged when the application is processed.

Initials:



APPLICATION FOR RENTAL

Rental Application for **The Copper**

Notice: All adult applicants (18 years or older) must complete a separate application for rental.

APPLICANT INFORMATION			
LAST NAME Bhatia		FIRST NAME Rajesh	M.I. SUFFIX
SSN ***-**-****		BIRTH DATE 1/11/1971	PHONE - TYPE (415) 298 - 3614 - Mobile
EMAIL bhatiarajesh329@yahoo.com			
CURRENT ADDRESS			
STREET ADDRESS 3452 S STUART AVE		CITY GILBERT	STATE AZ
DATE IN		DATE OUT current	MONTHLY RENT \$3,500.00 / Mo.
EMPLOYMENT & INCOME INFORMATION			
OCCUPATION Chief Technology Officer		EMPLOYER/COMPANY EndPoint	
SUPERVISOR -		SUPERVISOR PHONE (475) 223 - 8838	SALARY \$494,975.33/Yr.
EMPLOYER ADDRESS Remote		CITY Gilbert	STATE AZ
OCCUPATION VP, Product Development		EMPLOYER/COMPANY Oracle	
SUPERVISOR -		SUPERVISOR PHONE (415) 298 - 3614	SALARY \$141,090.21/Yr.
EMPLOYER ADDRESS 900 Long Ridge Rd		CITY Stamford	STATE CT
BACKGROUND INFORMATION			
Have you ever filed for bankruptcy? NO		Have you ever willfully refused to pay rent when due? NO	
Have you ever been evicted from a tenancy or left owing money? NO		Have you ever been convicted of a crime? NO	
SUPPLEMENTAL QUESTIONS			
Will the tenant be receiving stove knob covers from property? ☒ No, I do not want stove knob covers for my stove. There is no child under age six residing in my apartment.			
Window Guards: ☒ No children 10 years of age or younger live in my apartment			
Were you referred by a broker? NO			
I (we) have seen the actual apartment for which I (we) are applying?: NO			
Preferred Mailing Address: 3452 S STUART AVE, GILBERT, AZ 85297 - US			

APPLICATION CONSENT

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☒ Application consent was digitally accepted by Rajesh Bhatia (Guarantor)



Signed by Rajesh Bhatia

Sat Aug 17 2024 11:07:27 PM EDT

Key: ED3DFB20; IP Address: 207.38.135.40

Rajesh Bhatia (Guarantor)

Date

The following charge(s) will appear on your card statement as "ClickPay"

Application Fee - Charge Details

Name on Card	Account Number	Reference Number	Authorized
Mohit Changani	XXXXXXXXXXXX8385	14968195	\$21.50

This card has been authorized for the amount above and will be charged when the application is processed.

Initials:



APPLICATION FOR RENTAL

Rental Application for **The Copper**

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APPLICANT INFORMATION			
LAST NAME Changani		FIRST NAME Rakhee	M.I. K.
SSN ***_**_****		BIRTH DATE 11/17/1971	PHONE - TYPE (623) 698 - 7653 - Mobile
EMAIL rakchans54@gmail.com			
EMERGENCY CONTACT			
NAME Rajesh Bhatia		ADDRESS 3452 S STUART AVE, GILBERT, 5 85297	
PHONE (415) 298 - 3614	EMAIL ADDRESS bhatiarajesh329@gmail.com		RELATIONSHIP brother
CURRENT ADDRESS			
STREET ADDRESS 3452 S STUART AVE		CITY GILBERT	STATE AZ
ZIP 85297			
DATE IN	DATE OUT current	MONTHLY RENT \$0.00 / Mo.	
BACKGROUND INFORMATION			
Have you ever filed for bankruptcy? NO		Have you ever willfully refused to pay rent when due? NO	
Have you ever been evicted from a tenancy or left owing money? NO		Have you ever been convicted of a crime? NO	
SUPPLEMENTAL QUESTIONS			
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☒ Application consent was digitally accepted by Rakhee K. Changani (Occupant)



Signed by Rakhee K. Changani

Sun Aug 18 2024 03:33:28 PM EDT

Key: 72463E4C; IP Address: 68.174.40.202

Rakhee K. Changani (Applicant)

Date

The following charge(s) will appear on your card statement as "ClickPay"

Application Fee - Charge Details

Name on Card	Account Number	Reference Number	Authorized
Mohit Changani	XXXXXXXXXXXX8385	14969965	\$21.50

This card has been authorized for the amount above and will be charged when the application is processed.

Initials:



California Required Notices

This report does not guarantee the accuracy or truthfulness of the information as to the subject of the investigation, but only that it is accurately copied from public records, and information generated as a result of identity theft, including evidence of criminal activity, may be inaccurately associated with the consumer who is the subject of the report.

An investigative consumer reporting agency shall provide a consumer seeking to obtain a copy of a report or making a request to review a file, a written notice in simple, plain English and Spanish setting forth the terms and conditions of his or her right to receive all disclosures, as provided in CA Civil Code Section 1786.26.

This report was prepared using software provided by RP On-Site LLC, which can be contacted at: 2201 Lakeside Blvd., Richardson, TX 75082; 1-877-222-0384; or <https://www.on-site.com/request-rental-report-or-submit-dispute/>.

Avisos obligatorios en el estado de California

El presente informe no garantiza la exactitud ni la veracidad de la información con respecto al tema de investigación, sino únicamente que es una copia exacta de los registros públicos y es posible que la información generada como consecuencia del robo de identidad, incluidos los registros de antecedentes delictivos, se haya asociado por error con el consumidor objeto del presente informe.

Una agencia de investigación de verificación de crédito proporcionará al consumidor que desee obtener una copia de un informe o que solicite la revisión de un archivo un aviso por escrito en inglés y español, escrito en un lenguaje simple y claro, que establezca los términos y condiciones de su derecho a recibir todas las divulgaciones conforme a la Sección 1786.26 del Código Civil de California.

Este informe se preparo con el software proporcionado pro RP On-Site LLC, que puede contractarse en: 2201 Lakeside Blvd., Richardson, TX 75082; 1-877-222-0384; or <https://www.on-site.com/request-rental-report-or-submit-dispute/>.

Rental Report for Mohit K. Changani**The property's screening criteria result****PENDING**

There is screening pending and no overall recommendation yet. Any scores are preliminary, and do not necessarily reflect the final recommendation.

Score for Mohit K. Changani: 820

		Importance	Result
AI Score		Pass/Fail	👍
No Credit		Pass/Conditional	👍
Total annual income to rent ratio exceeds 40.0		Pass/Fail	PENDING
May have been through a bankruptcy		Pass/Fail	👍
No unpaid rental collections		Pass/Fail	👍
Employment verification must not be Verified False		Pass/Fail	PENDING
Criminal and Other Public Records: Felony Convictions		Pass/Fail	👍
Total Considered Felony Convictions	None	Pass/Fail	👍
Alcohol	None ever	Pass/Fail	👍
Bad Check	None ever	Pass/Fail	👍
Criminal Other	None ever	Pass/Fail	👍
Drug Manufacture Distribution	None ever	Pass/Fail	👍
Drug Marijuana Use	None ever	Pass/Fail	👍
Drug Meth Manufacture	None ever	Pass/Fail	👍
Drug Use	None ever	Pass/Fail	👍
Fraud	None ever	Pass/Fail	👍



Rental Report for Mohit K. Changani, 8/18/2024 at The Copper

Government Obstruction	None ever	Pass/Fail	
Kidnapping	None ever	Pass/Fail	
Property Destruction	None ever	Pass/Fail	
Property Other	None ever	Pass/Fail	
Property Theft	None ever	Pass/Fail	
Prostitution	None ever	Pass/Fail	
Sex Offense Coerced	None ever	Pass/Fail	
Sex Offense Willful	None ever	Pass/Fail	
Society Other	None ever	Pass/Fail	
Violent Fatal	None ever	Pass/Fail	
Violent Non Fatal	None ever	Pass/Fail	
Weapons	None ever	Pass/Fail	
Wildlife	None ever	Pass/Fail	
Criminal and Other Public Records: Misdemeanor Convictions		Pass/Fail	
Total Considered Misdemeanor Convictions	None	Pass/Fail	
Alcohol	None ever	Pass/Fail	
Bad Check	None ever	Pass/Fail	
Criminal Other	None ever	Pass/Fail	
Drug Manufacture Distribution	None ever	Pass/Fail	
Drug Marijuana Use	None ever	Pass/Fail	
Drug Meth Manufacture	None ever	Pass/Fail	
Drug Use	None ever	Pass/Fail	
Fraud	None ever	Pass/Fail	
Government Obstruction	None ever	Pass/Fail	
Kidnapping	None ever	Pass/Fail	
Property Destruction	None ever	Pass/Fail	
Property Other	None ever	Pass/Fail	
Property Theft	None ever	Pass/Fail	
Prostitution	None ever	Pass/Fail	
Sex Offense Coerced	None ever	Pass/Fail	
Sex Offense Willful	None ever	Pass/Fail	
Society Other	None ever	Pass/Fail	
Violent Fatal	None ever	Pass/Fail	
Violent Non Fatal	None ever	Pass/Fail	
Weapons	None ever	Pass/Fail	
Wildlife	None ever	Pass/Fail	
Is not a registered sex offender		Pass/Fail	

NOTIFICATION(S)

APPLICANT: Equifax Credit File Frozen

There is a freeze on this credit file, meaning that it is inaccessible unless the applicant contacts the credit bureau to release the freeze. We recommend to release the freeze for at least five days. Once the applicant releases the file, contact us and we will attempt to process the screening report.

APPLICANT: Applicant Social Security Number Has Never Been Issued or was Issued After June 2011 (Equifax)

The social security number listed on the application has never been issued or was issued after June 2011. This could mean that the number was entered incorrectly, it is a Credit Privacy Number (CPN), or it was accurately issued after 2011. You should verify the information thoroughly before proceeding.

APPLICANT: SSN Has Never Been Issued (TransUnion)

The social security number on the application has never been issued by the social security administration. You should verify the information thoroughly before proceeding.

APPLICANT: Address Has Been Reported More than Once - ACTION REQUIRED (TransUnion)

An address listed on the application has been used more than once by the applicant with different unit numbers or PO box numbers. You should verify the information thoroughly. Before proceeding you must verify that the information in the report relates to the actual applicant in question as required by law under FCRA Section 605(h).

Credit Quick Summary

Total annual income (reported by Applicant)	\$95,000.00	
Total verified annual income	Pending	
Total verified combined annual income to rent ratio	Pending (based on rent of \$8,316.37)	
Total number of accounts	8	
Accounts with no late payments	8 (0 unpaid past due)	
Accounts paid 30-59 days past due	0 (0 unpaid past due)	
Accounts paid 60-89 days past due	0 (0 unpaid past due)	
Accounts paid more than 90 days past due	0 (0 unpaid past due)	
Total outstanding balance	\$5,982.00 (\$0.00 past due)	
Outstanding revolving debt	\$5,982.00 (30% of limit) (\$0.00 past due)	
Outstanding loan balance	\$0.00 (\$0.00 past due)	
Bankruptcies, foreclosures, and legal items	0	
Collection total balance (includes past due)	\$0.00	
Rental History records found	0	

Identity	From Application	From TransUnion
Name:	Mohit K. Changani	MOHIT K. CHANGANI MOHIT CHANGANI
SSN:	***_**_****	***_**_****
Birth Date:	1/**/1999	1/**/1999

Addresses	From Application	From TransUnion
	250 East 39th Street, Apt 3D New York, NY 10016 - US	432 W GORHAM 936 MADISON, WI 53703 (Applicant) Reported 8/2020 11 THE MEWS WESTPORT, CT 06880 (Applicant) Reported 8/2017 821 W JOHNSON 623 MADISON, WI 53706 (Applicant)

Employment	From Application	From TransUnion
Applicant:	Business Development Analyst Gigapower \$95,000.00/Yr. Total annual Income: \$95,000.00	

Employment Verifications

From RealPage



Rental Report for Mohit K. Changani, 8/18/2024 at The Copper

Requested For Mohit K. Changani Requested Date 8/18/2024	Employer Gigapower	Position Held Business Development Analyst	Annual Salary \$95,000.00	Supervisor Pamit Surana (917) 747 - 4822
	Results Pending			

Criminal and Other Public Records				
Requested For Mohit K. Changani	Location Searched Multistate Search	Period Searched 8/18/2017 - 8/18/2024	Requested 8/18/2024	Returned 8/18/2024
Results No Records Found				

National Sex Offender Registry History		
Requested For Mohit K. Changani	Date Requested 8/18/2024	Date Returned 8/18/2024
Results No Records Found		

Restricted Person Search		
Requested For Mohit K. Changani	Requested 8/18/2024	Returned 8/18/2024
Results No Records Found		

Risk Models		
From RealPage		
Risk Model Name RealPage AI Score (Applicant)	Score 820	Score Factors Tradeline scoring Debt-to-income ratio Credit Score Rental Payment History
	Description RealPage AI Score uses machine-learning and data patterns in credit score, debt/liability types, trade lines, rental payment history, and renter behavior to achieve reduced bad debt. The RealPage AI Score range is between 1 and 1000 (the higher the score, the less risky the consumer).	

From TransUnion		
Risk Model Name Credit Score (Applicant)	Score 771	Score Factors The date that you opened your oldest account is too recent Lack of sufficient credit history Lack of sufficient relevant real estate account information The total of all balances on your open accounts is too high
	Description This credit score is a widely used risk model that uses credit report data to predict the likelihood of default. The credit score range is between 300 and 850 (the higher the score, the less risky the consumer).	

Credit Accounts													
From TransUnion													
Account Name JPMCB CARD (Applicant)	Opened 8/2020	Last Active 8/2024	30-59 0	60-89 0	90+ 0	Past Due \$0.00	Balance \$3,930.00						
	Monthly Payment	High Credit \$5,198.00	Type REVOLVING	Comments Rate/Status 01: Paid or paying as agreed									
	Payment History 0 7/245/243/241/2411/239/237/235/233/231/2311/229/22												

Account Name JPMCB CARD (Applicant)	Opened 3/2022	Last Active 8/2024	30-59 0	60-89 0	90+ 0	Past Due \$0.00	Balance \$1,905.00
	Monthly Payment	High Credit \$3,956.00	Type REVOLVING	Comments Rate/Status 01: Paid or paying as agreed			
	Payment History 						
Account Name JPMCB CARD (Applicant)	Opened 10/2019	Last Active 8/2024	30-59 0	60-89 0	90+ 0	Past Due \$0.00	Balance \$147.00
	Monthly Payment	High Credit \$4,883.00	Type REVOLVING	Comments Rate/Status 01: Paid or paying as agreed			
	Payment History 						
Account Name WFBNA CARD (Applicant)	Opened 12/2022	Last Active 8/2024	30-59 0	60-89 0	90+ 0	Past Due \$0.00	Balance \$0.00
	Monthly Payment	High Credit \$2,934.00	Type REVOLVING	Comments Rate/Status 01: Paid or paying as agreed			
	Payment History 						
Account Name WFBNA CARD (Applicant)	Opened 2/2019	Last Active 8/2020	30-59 0	60-89 0	90+ 0	Past Due \$0.00	Balance \$0.00
	Monthly Payment	High Credit \$1,479.00	Type REVOLVING	Comments ACCOUNT CLOSED BY CONSUMER Rate/Status 01: Paid or paying as agreed			
	Payment History 						
Account Name UNIV WISCU (Applicant)	Opened 8/2017	Last Active 10/2019	30-59 0	60-89 0	90+ 0	Past Due \$0.00	Balance \$0.00
	Monthly Payment	High Credit \$1,040.00	Type REVOLVING	Comments Rate/Status 01: Paid or paying as agreed			
	Payment History 						
Account Name UNIV WIS CU (Applicant)	Opened 8/2017	Last Active 11/2018	30-59 0	60-89 0	90+ 0	Past Due \$0.00	Balance \$0.00
	Monthly Payment	High Credit \$200.00	Type OVERDRAFT/RESERVE	Comments Rate/Status 01: Paid or paying as agreed			
	Payment History 						



Rental Report for Mohit K. Changani, 8/18/2024 at The Copper

Account Name SYNCB/PPC (Applicant)	Opened 3/2019	Last Active 7/2019	30-59 0	60-89 0	90+ 0	Past Due \$0.00	Balance \$0.00
	Monthly Payment	High Credit \$36.00	Type REVOLVING	Comments INACTIVE ACCOUNT Rate/Status 01: Paid or paying as agreed			
	Payment History  The payment history shows 24 months of payments. The first 23 months are green, indicating on-time payments. The last month (month 24) is red, indicating a late payment.						

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Una agencia de investigación de verificación de crédito proporcionará al consumidor que desee obtener una copia de un informe o que solicite la revisión de un archivo un aviso por escrito en inglés y español, escrito en un lenguaje simple y claro, que establezca los términos y condiciones de su derecho a recibir todas las divulgaciones conforme a la Sección 1786.26 del Código Civil de California.

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Rental Report for Rajesh Bhatia (Guarantor)**The property's screening criteria result****PENDING**

There is screening pending and no overall recommendation yet. Any scores are preliminary, and do not necessarily reflect the final recommendation.

Score for Rajesh Bhatia (Guarantor): 874

		Importance	Result
AI Score		Pass/Fail	👍
Total annual income to rent ratio exceeds 80.0		Pass/Fail	PENDING
May have been through a bankruptcy		Pass/Fail	👍
No unpaid rental collections		Pass/Fail	👍
Employment verification must not be Verified False		Pass/Fail	PENDING
Bank Verifications			PENDING
Bank verification must not be Verified False or Any Negative Reference		Pass/Fail	PENDING
Bank verification must not be Unable to Verify		Pass/Fail	PENDING
Criminal and Other Public Records: Felony Convictions		Pass/Fail	👍
Total Considered Felony Convictions	None	Pass/Fail	👍
Alcohol	None ever	Pass/Fail	👍
Bad Check	None ever	Pass/Fail	👍
Criminal Other	None ever	Pass/Fail	👍
Drug Manufacture Distribution	None ever	Pass/Fail	👍
Drug Marijuana Use	None ever	Pass/Fail	👍
Drug Meth Manufacture	None ever	Pass/Fail	👍



Rental Report for Rajesh Bhatia (Guarantor), 8/18/2024 at The Copper

Drug Use	None ever	Pass/Fail	
Fraud	None ever	Pass/Fail	
Government Obstruction	None ever	Pass/Fail	
Kidnapping	None ever	Pass/Fail	
Property Destruction	None ever	Pass/Fail	
Property Other	None ever	Pass/Fail	
Property Theft	None ever	Pass/Fail	
Prostitution	None ever	Pass/Fail	
Sex Offense Coerced	None ever	Pass/Fail	
Sex Offense Willful	None ever	Pass/Fail	
Society Other	None ever	Pass/Fail	
Violent Fatal	None ever	Pass/Fail	
Violent Non Fatal	None ever	Pass/Fail	
Weapons	None ever	Pass/Fail	
Wildlife	None ever	Pass/Fail	
Criminal and Other Public Records: Misdemeanor Convictions		Pass/Fail	
Total Considered Misdemeanor Convictions	None	Pass/Fail	
Alcohol	None ever	Pass/Fail	
Bad Check	None ever	Pass/Fail	
Criminal Other	None ever	Pass/Fail	
Drug Manufacture Distribution	None ever	Pass/Fail	
Drug Marijuana Use	None ever	Pass/Fail	
Drug Meth Manufacture	None ever	Pass/Fail	
Drug Use	None ever	Pass/Fail	
Fraud	None ever	Pass/Fail	
Government Obstruction	None ever	Pass/Fail	
Kidnapping	None ever	Pass/Fail	
Property Destruction	None ever	Pass/Fail	
Property Other	None ever	Pass/Fail	
Property Theft	None ever	Pass/Fail	
Prostitution	None ever	Pass/Fail	
Sex Offense Coerced	None ever	Pass/Fail	
Sex Offense Willful	None ever	Pass/Fail	
Society Other	None ever	Pass/Fail	
Violent Fatal	None ever	Pass/Fail	
Violent Non Fatal	None ever	Pass/Fail	
Weapons	None ever	Pass/Fail	
Wildlife	None ever	Pass/Fail	
Is not a registered sex offender		Pass/Fail	

Credit Quick Summary		
Total annual income (reported by Applicant)	\$636,065.54	
Total verified annual income	Pending	
Total verified combined annual income to rent ratio	Pending (based on rent of \$8,316.37)	
Total number of accounts	26	
Accounts with no late payments	26 (0 unpaid past due)	
Accounts paid 30-59 days past due	0 (0 unpaid past due)	
Accounts paid 60-89 days past due	0 (0 unpaid past due)	
Accounts paid more than 90 days past due	0 (0 unpaid past due)	
Total outstanding balance	\$620,576.00 (\$0.00 past due)	
Outstanding revolving debt	\$4,965.00 (0% of limit) (\$0.00 past due)	
Outstanding loan balance	\$615,611.00 (\$0.00 past due)	
Bankruptcies, foreclosures, and legal items	0	
Collection total balance (includes past due)	\$0.00	
Rental History records found	0	

Identity	From Application	From Equifax
Name:	Rajesh Bhatia (Guarantor)	RAJESH K. BHATIA RAJESH BUATIA
SSN:	***_**_****	***_**_****
Birth Date:	1/**/1969	1/**/1969

Addresses	From Application	From Equifax
	3452 S STUART AVE GILBERT, AZ 85297 - US	3452 S STUART AVE. GILBERT, AZ 85297 (Applicant) Reported 8/2024 11 THE MEWS WESTPORT, CT 06880 (Applicant) Reported 6/2020 320 STRAWBERRY HILL AVE. 19 STAMFORD, CT 06902 (Applicant) Reported 6/2020 606 ARTISTIC PL. HAYWARD, CA 94541 (Applicant) Reported 10/2018 1823 15TH ST APT 3 SAN FRANCISCO, CA 94103 (Applicant) Reported 10/2010 900 LONG RIDGE RD. STAMFORD, CT 06902 (Applicant) Reported 10/2010 20450 STEVENS CREEK BLVD CUPERTINO, CA 95014 (Applicant) Reported 10/2010 1175 PARK PL. 225 SAN MATEO, CA 94403 (Applicant) Reported 10/2010



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Employment	From Application	From Equifax
Applicant:	Chief Technology Officer EndPoint \$494,975.33/Yr. VP, Product Development Oracle \$141,090.21/Yr. Total annual Income: \$636,065.54	PURDUE UNIVERSI

Employment Verifications
From RealPage

Requested For Rajesh Bhatia (Guarantor) Requested Date 8/18/2024	Employer EndPoint	Position Held Chief Technology Officer	Annual Salary \$494,975.33	Supervisor - (475) 223 - 8838
	Results Pending			

Requested For Rajesh Bhatia (Guarantor) Requested Date 8/18/2024	Employer Oracle	Position Held VP, Product Development	Annual Salary \$141,090.21	Supervisor - (415) 298 - 3614
	Results Pending			

Bank Verifications
From RealPage

Requested For Rajesh Bhatia (Guarantor) Requested Date 8/18/2024	Bank Name	Account Number	Results Pending	

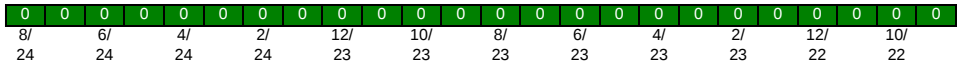
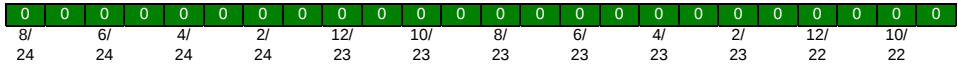
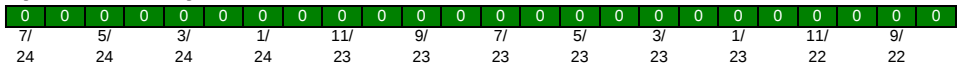
Criminal and Other Public Records				
Requested For Rajesh Bhatia (Guarantor)	Location Searched Multistate Search	Period Searched 8/18/2017 - 8/18/2024	Requested 8/18/2024	Returned 8/18/2024
Results No Records Found				

National Sex Offender Registry History		
Requested For Rajesh Bhatia (Guarantor)	Date Requested 8/18/2024	Date Returned 8/18/2024
Results No Records Found		

Restricted Person Search		
Requested For Rajesh Bhatia	Requested 8/18/2024	Returned 8/18/2024
Results No Records Found		

Risk Models		
From RealPage		
Risk Model Name RealPage AI Score (Applicant)	Score 874	Score Factors Tradeline scoring Debt-to-income ratio Credit Score Rental Payment History
Description RealPage AI Score uses machine-learning and data patterns in credit score, debt/liability types, trade lines, rental payment history, and renter behavior to achieve reduced bad debt. The RealPage AI Score range is between 1 and 1000 (the higher the score, the less risky the consumer).		

From Equifax		
Risk Model Name Credit Score (Applicant)	Score 823	Score Factors Your largest credit limit on open bankcard or revolving accounts is too low Total of all balances on bankcard or revolving accounts is too high The balances on your accounts are too high compared to loan amounts The date that you opened your oldest account is too recent
Description This credit score is a widely used risk model that uses credit report data to predict the likelihood of default. The credit score range is between 300 and 850 (the higher the score, the less risky the consumer).		

Credit Accounts							
From Equifax							
Account Name WFBNA HOME LENDING (Applicant)	Opened 8/2021	Last Active 7/2024	30-59	60-89	90+	Past Due	Balance \$457,207.00
	Monthly Payment \$4,172.00	High Credit \$650,000.00	Type MORTGAGE	Comments FIXED RATE Rate/Status 1: Pays account as agreed			
	Payment History 						
Account Name THE MONEY SOURCE (Applicant)	Opened 10/2018	Last Active 7/2024	30-59	60-89	90+	Past Due	Balance \$85,217.00
	Monthly Payment \$1,914.00	High Credit \$252,350.00	Type MORTGAGE	Comments FANNIE MAE ACCOUNT FIXED RATE Rate/Status 1: Pays account as agreed			
	Payment History 						
Account Name FREEDOM MORTGAGE (Applicant)	Opened 8/2013	Last Active 6/2024	30-59	60-89	90+	Past Due	Balance \$60,603.00
	Monthly Payment \$2,018.00	High Credit \$237,188.00	Type MORTGAGE	Comments FANNIE MAE ACCOUNT Rate/Status 1: Pays account as agreed			
	Payment History 						



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Account Name WFBNA HOME LENDING (Applicant)	Opened 5/2012	Last Active 7/2024	30-59	60-89	90+	Past Due	Balance \$12,584.00
	Monthly Payment \$989.00	High Credit \$102,000.00	Type MORTGAGE	Comments FANNIE MAE ACCOUNT FIXED RATE Rate/Status 1: Pays account as agreed			
	Payment History 0 8/246/244/242/2412/2310/238/236/234/232/2312/2210/22						
Account Name CAPITAL ONE BANK USA (Applicant)	Opened 5/2023	Last Active 6/2024	30-59	60-89	90+	Past Due	Balance \$2,909.00
	Monthly Payment \$29.00	High Credit \$11,336.00	Type REVOLVING	Comments Rate/Status 1: Pays account as agreed			
	Payment History 0 7/245/243/241/2411/239/237/23						
Account Name CITICARDS CBNA (Applicant)	Opened 3/2016	Last Active 6/2024	30-59	60-89	90+	Past Due	Balance \$2,056.00
	Monthly Payment \$41.00	High Credit \$17,349.00	Type REVOLVING	Comments Rate/Status 1: Pays account as agreed			
	Payment History 0 7/245/243/241/2411/239/237/235/233/231/2311/229/22						
Account Name WFBNA HOME LENDING (Applicant)	Opened 7/2019	Last Active 6/2020	30-59	60-89	90+	Past Due	Balance \$0.00
	Monthly Payment	High Credit \$749,000.00	Type MORTGAGE	Comments FIXED RATE Rate/Status 1: Pays account as agreed			
	Payment History 0 8/206/204/202/2012/1910/198/19						
Account Name WFBNA HOME LENDING (Applicant)	Opened 7/2020	Last Active 7/2021	30-59	60-89	90+	Past Due	Balance \$0.00
	Monthly Payment	High Credit \$731,000.00	Type MORTGAGE	Comments FIXED RATE Rate/Status 1: Pays account as agreed			
	Payment History 0 8/216/214/212/2112/2010/208/20						
Account Name WFBNA HOME LENDING (Applicant)	Opened 3/2012	Last Active 9/2021	30-59	60-89	90+	Past Due	Balance \$0.00
	Monthly Payment	High Credit \$577,000.00	Type MORTGAGE	Comments FANNIE MAE ACCOUNT FIXED RATE Rate/Status 1: Pays account as agreed			
	Payment History 0 11/219/217/215/213/211/2111/209/207/205/203/201/20						

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Rental Report for Rajesh Bhatia (Guarantor), 8/18/2024 at The Copper

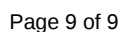
Account Name JPMCB CARD SERVICES (Applicant)	Opened 2/2017	Last Active 9/2021	30-59	60-89	90+	Past Due	Balance \$0.00
	Monthly Payment	High Credit \$27,431.00	Type REVOLVING	Comments ACCOUNT CLOSED AT CONSUMER'S REQUEST Rate/Status 1: Pays account as agreed			
	Payment History 0 12/21 10/21 8/21 6/21 4/21 2/21 12/20 10/20 8/20 6/20 4/20 2/20						
Account Name JPMCB CARD SERVICES (Applicant)	Opened 2/2002	Last Active 12/2011	30-59	60-89	90+	Past Due	Balance \$0.00
	Monthly Payment	High Credit \$26,409.00	Type REVOLVING	Comments ACCOUNT CLOSED AT CONSUMER'S REQUEST Rate/Status 1: Pays account as agreed			
	Payment History 0 12/21 10/21 8/21 6/21 4/21 2/21 12/20 10/20 8/20 6/20 4/20 2/20						
Account Name JPMCB CARD SERVICES (Applicant)	Opened 6/2011	Last Active 1/2017	30-59	60-89	90+	Past Due	Balance \$0.00
	Monthly Payment	High Credit \$19,063.00	Type REVOLVING	Comments ACCOUNT CLOSED AT CONSUMER'S REQUEST Rate/Status 1: Pays account as agreed			
	Payment History 0 7/24 5/24 3/24 1/24 11/23 9/23 7/23 5/23 3/23 1/23 11/22 9/22						
Account Name AMERICAN EXPRESS (Applicant)	Opened 8/2022	Last Active 5/2024	30-59	60-89	90+	Past Due	Balance \$0.00
	Monthly Payment	High Credit \$18,188.00	Type OPEN ACCOUNT	Comments Rate/Status 1: Pays account as agreed			
	Payment History 0 7/24 5/24 3/24 1/24 11/23 9/23 7/23 5/23 3/23 1/23 11/22 9/22						
Account Name JPMCB CARD SERVICES (Applicant)	Opened 6/2021	Last Active 4/2023	30-59	60-89	90+	Past Due	Balance \$0.00
	Monthly Payment	High Credit \$14,345.00	Type REVOLVING	Comments ACCOUNT CLOSED AT CONSUMER'S REQUEST Rate/Status 1: Pays account as agreed			
	Payment History 0 5/23 3/23 1/23 11/22 9/22 7/22 5/22 3/22 1/22 11/21 9/21 7/21						
Account Name JPMCB CARD SERVICES (Applicant)	Opened 7/2015	Last Active 11/2015	30-59	60-89	90+	Past Due	Balance \$0.00
	Monthly Payment	High Credit \$6,344.00	Type REVOLVING	Comments ACCOUNT CLOSED AT CONSUMER'S REQUEST Rate/Status 1: Pays account as agreed			
	Payment History 0 7/24 5/24 3/24 1/24 11/23 9/23 7/23 5/23 3/23 1/23 11/22 9/22						
Account Name SYNCB/CRATE&BARR (Applicant)	Opened 9/2019	Last Active 6/2023	30-59	60-89	90+	Past Due	Balance \$0.00
	Monthly Payment	High Credit \$1,695.00	Type REVOLVING	Comments Rate/Status 1: Pays account as agreed			
	Payment History 0 7/24 5/24 3/24 1/24 11/23 9/23 7/23 5/23 3/23 1/23 11/22 9/22						

Rental Report for Rajesh Bhatia (Guarantor), 8/18/2024 at The Copper

Account Name BARCLAYS BANK/BANANA (Applicant)	Opened 6/2023	Last Active 11/2023	30-59	60-89	90+	Past Due	Balance \$0.00																																									
	Monthly Payment	High Credit \$323.00	Type REVOLVING	Comments Rate/Status 1: Pays account as agreed																																												
	Payment History <table><tr><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td></tr><tr><td>7/</td><td></td><td>5/</td><td></td><td>3/</td><td></td><td>1/</td><td></td><td>11/</td><td></td><td>9/</td><td></td><td>7/</td><td></td></tr><tr><td>24</td><td></td><td>24</td><td></td><td>24</td><td></td><td>24</td><td></td><td>23</td><td></td><td>23</td><td></td><td>23</td><td></td></tr></table>							0	0	0	0	0	0	0	0	0	0	0	0	0	0	7/		5/		3/		1/		11/		9/		7/		24		24		24		24		23		23		23
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Account Name SYNCB/CRATE&BARRELL (Applicant)	Opened 8/2017	Last Active 8/2017	30-59	60-89	90+	Past Due	Balance \$0.00																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																														
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Previous Credit Inquiries	
From Equifax	
5/2023	CAPITAL ONE BANK USA (Applicant)



California Required Notices

This report does not guarantee the accuracy or truthfulness of the information as to the subject of the investigation, but only that it is accurately copied from public records, and information generated as a result of identity theft, including evidence of criminal activity, may be inaccurately associated with the consumer who is the subject of the report.

An investigative consumer reporting agency shall provide a consumer seeking to obtain a copy of a report or making a request to review a file, a written notice in simple, plain English and Spanish setting forth the terms and conditions of his or her right to receive all disclosures, as provided in CA Civil Code Section 1786.26.

This report was prepared using software provided by RP On-Site LLC, which can be contacted at: 2201 Lakeside Blvd., Richardson, TX 75082; 1-877-222-0384; or <https://www.on-site.com/request-rental-report-or-submit-dispute/>.

Avisos obligatorios en el estado de California

El presente informe no garantiza la exactitud ni la veracidad de la información con respecto al tema de investigación, sino únicamente que es una copia exacta de los registros públicos y es posible que la información generada como consecuencia del robo de identidad, incluidos los registros de antecedentes delictivos, se haya asociado por error con el consumidor objeto del presente informe.

Una agencia de investigación de verificación de crédito proporcionará al consumidor que desee obtener una copia de un informe o que solicite la revisión de un archivo un aviso por escrito en inglés y español, escrito en un lenguaje simple y claro, que establezca los términos y condiciones de su derecho a recibir todas las divulgaciones conforme a la Sección 1786.26 del Código Civil de California.

Este informe se preparo con el software proporcionado pro RP On-Site LLC, que puede contractarse en: 2201 Lakeside Blvd., Richardson, TX 75082; 1-877-222-0384; or <https://www.on-site.com/request-rental-report-or-submit-dispute/>.

Rental Report for Rakhee K. Changanani (Occupant)**The property's screening criteria result****PENDING**

There is screening pending and no overall recommendation yet. Any scores are preliminary, and do not necessarily reflect the final recommendation.

Score for Rakhee K. Changanani (Occupant): 829

		Importance	Result
AI Score		Pass/Fail	👍
No Credit		Pass/Conditional	👍
No unpaid rental collections		Pass/Fail	👍
Criminal and Other Public Records: Felony Convictions		Pass/Fail	👍
Total Considered Felony Convictions	None	Pass/Fail	👍
Alcohol	None ever	Pass/Fail	👍
Bad Check	None ever	Pass/Fail	👍
Criminal Other	None ever	Pass/Fail	👍
Drug Manufacture Distribution	None ever	Pass/Fail	👍
Drug Marijuana Use	None ever	Pass/Fail	👍
Drug Meth Manufacture	None ever	Pass/Fail	👍
Drug Use	None ever	Pass/Fail	👍
Fraud	None ever	Pass/Fail	👍
Government Obstruction	None ever	Pass/Fail	👍
Kidnapping	None ever	Pass/Fail	👍
Property Destruction	None ever	Pass/Fail	👍



Rental Report for Rakhee K. Changani (Occupant), 8/18/2024 at The Copper

Property Other	None ever	Pass/Fail	
Property Theft	None ever	Pass/Fail	
Prostitution	None ever	Pass/Fail	
Sex Offense Coerced	None ever	Pass/Fail	
Sex Offense Willful	None ever	Pass/Fail	
Society Other	None ever	Pass/Fail	
Violent Fatal	None ever	Pass/Fail	
Violent Non Fatal	None ever	Pass/Fail	
Weapons	None ever	Pass/Fail	
Wildlife	None ever	Pass/Fail	
Criminal and Other Public Records: Misdemeanor Convictions		Pass/Fail	
Total Considered Misdemeanor Convictions	None	Pass/Fail	
Alcohol	None ever	Pass/Fail	
Bad Check	None ever	Pass/Fail	
Criminal Other	None ever	Pass/Fail	
Drug Manufacture Distribution	None ever	Pass/Fail	
Drug Marijuana Use	None ever	Pass/Fail	
Drug Meth Manufacture	None ever	Pass/Fail	
Drug Use	None ever	Pass/Fail	
Fraud	None ever	Pass/Fail	
Government Obstruction	None ever	Pass/Fail	
Kidnapping	None ever	Pass/Fail	
Property Destruction	None ever	Pass/Fail	
Property Other	None ever	Pass/Fail	
Property Theft	None ever	Pass/Fail	
Prostitution	None ever	Pass/Fail	
Sex Offense Coerced	None ever	Pass/Fail	
Sex Offense Willful	None ever	Pass/Fail	
Society Other	None ever	Pass/Fail	
Violent Fatal	None ever	Pass/Fail	
Violent Non Fatal	None ever	Pass/Fail	
Weapons	None ever	Pass/Fail	
Wildlife	None ever	Pass/Fail	
Is not a registered sex offender		Pass/Fail	

NOTIFICATION(S)

APPLICANT: Applicant Social Security Number Has Never Been Issued or was Issued After June 2011 (Equifax)

The social security number listed on the application has never been issued or was issued after June 2011. This could mean that the number was entered incorrectly, it is a Credit Privacy Number (CPN), or it was accurately issued after 2011. You should verify the information thoroughly before proceeding.

Credit Quick Summary

Total annual income (reported by Applicant)	\$0.00	
Total combined annual income to rent ratio	9.52 (based on rent of \$9,979.64)	
Total number of accounts	3	
Accounts with no late payments	3 (0 unpaid past due)	
Accounts paid 30-59 days past due	0 (0 unpaid past due)	
Accounts paid 60-89 days past due	0 (0 unpaid past due)	
Accounts paid more than 90 days past due	0 (0 unpaid past due)	
Total outstanding balance	\$2,368.00 (\$0.00 past due)	
Outstanding revolving debt	\$2,368.00 (39% of limit) (\$0.00 past due)	
Outstanding loan balance	\$0.00 (\$0.00 past due)	
Bankruptcies, foreclosures, and legal items	0	
Collection total balance (includes past due)	\$0.00	
Rental History records found	0	

Identity	From Application	From Equifax
Name:	Rakhee K. Changani (Occupant)	RAKHEE K. CHANGANI
SSN:	***_**_****	***_**_****
Birth Date:	11/**/1971	11/**/1971

Addresses	From Application	From Equifax
	3452 S STUART AVE GILBERT, AZ 85297 - US	3452 S STUART AVE. GILBERT, AZ 85297 (Applicant) Reported 8/2024 11 THE MEWS WESTPORT, CT 06880 (Applicant) Reported 8/2019

Employment	From Application	From Equifax
Applicant:	Total annual Income:	

Criminal and Other Public Records

Requested For	Location Searched	Period Searched	Requested	Returned
Rakhee K. Changani (Occupant)	Multistate Search	8/18/2017 - 8/18/2024	8/18/2024	8/18/2024
Results No Records Found				

National Sex Offender Registry History

Requested For	Date Requested	Date Returned
Rakhee K. Changani (Occupant)	8/18/2024	8/18/2024
Results No Records Found		

Restricted Person Search

Requested For	Requested	Returned
Rakhee K. Changani	8/18/2024	8/18/2024
Results No Records Found		



Risk Models		
From RealPage		
Risk Model Name RealPage AI Score (Applicant)	Score 829	Score Factors Tradeline scoring Debt-to-income ratio Credit Score Rental Payment History
	Description RealPage AI Score uses machine-learning and data patterns in credit score, debt/liability types, trade lines, rental payment history, and renter behavior to achieve reduced bad debt. The RealPage AI Score range is between 1 and 1000 (the higher the score, the less risky the consumer).	
From Equifax		
Risk Model Name Credit Score (Applicant)	Score 780	Score Factors Lack of sufficient credit history on bankcard or revolving accounts You have either very few loans or too many loans with recent delinquencies Lack of sufficient relevant first mortgage account information The date that you opened your oldest account is too recent
	Description This credit score is a widely used risk model that uses credit report data to predict the likelihood of default. The credit score range is between 300 and 850 (the higher the score, the less risky the consumer).	

Credit Accounts							
From Equifax							
Account Name WELLS FARGO CARD SER (Applicant)	Opened 7/2023	Last Active 7/2024	30-59	60-89	90+	Past Due	Balance \$2,368.00
	Monthly Payment \$25.00	High Credit \$6,099.00	Type REVOLVING	Comments Rate/Status 1: Pays account as agreed			
	Payment History 0000000000000 8/246/244/242/2412/2310/238/23						
Account Name WELLS FARGO CARD SER (Applicant)	Opened 4/2014	Last Active 5/2015	30-59	60-89	90+	Past Due	Balance \$0.00
	Monthly Payment	High Credit \$25.00	Type REVOLVING	Comments ACCOUNT CLOSED AT CONSUMER'S REQUEST Rate/Status 1: Pays account as agreed			
	Payment History 0000000000000000000000000000000000 7/245/243/241/2411/239/237/235/233/231/2311/229/22						
Account Name AMERICAN EXPRESS (Applicant)	Opened 8/2017	Last Active	30-59	60-89	90+	Past Due	Balance \$0.00
	Monthly Payment	High Credit \$0.00	Type REVOLVING	Comments Rate/Status 1: Pays account as agreed			
	Payment History 0000000000000000000000000000000000 7/245/243/241/2411/239/237/235/233/231/2311/229/22						

UNITED STATES OF AMERICA
PERMANENT RESIDENT

CHANGANI RAKHEE 17 NOV 1971



Surname
CHANGANI

Given Name
RAKHEE K

Country of Birth
India

USCIS#
063-303-780

Date of Birth
17 NOV 1971

Category
F41

Sex
F

Card Expires: **12/08/33** Resident Since: **04/04/14**

Mark J. Schroeder
Commissioner of Motor Vehicles

NEW YORK STATE ^{USA}

IDENTIFICATION CARD



ID **726 929 836**

Class **ID**

**CHANGANI
MOHIT, KUMAR**

**250 E 39TH ST APT 3D
NEW YORK, NY 10016**

DOB **01/05/1999**

Issued **03/07/2022**

Expires **01/05/2031**

E **NONE**

R **NONE**

Sex **M** Height **5'-11"** Eyes **BRO**

**JAN
99**

MOHIT CHANGANI
MOHIT C
JAN 05 99

EXCELSIOR
PLURIBUS UNUM

For the year Jan. 1–Dec. 31, 2023, or other tax year beginning _____, 2023, ending _____, 20____ See separate instructions.

Your first name and middle initial MOHIT K		Last name CHANGANI	Your social security number 001-91-0824
If joint return, spouse's first name and middle initial		Last name	Spouse's social security number
Home address (number and street). If you have a P.O. box, see instructions. 250 E 39TH ST		Apt. no. 3D	Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. ☐ You ☐ Spouse
City, town, or post office. If you have a foreign address, also complete spaces below. NEW YORK		State NY	
Foreign country name		Foreign province/state/county	
		ZIP code 10016-2114	
		Foreign postal code	

Filing Status ☒ Single ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)

Check only one box. ☐ Married filing jointly (even if only one had income)

If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent: _____

Digital Assets At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) ☐ Yes ☒ No

Standard Deduction ☐ Someone can claim: ☐ You as a dependent ☐ Your spouse as a dependent ☐ Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness You: ☐ Were born before January 2, 1959 ☐ Are blind Spouse: ☐ Was born before January 2, 1959 ☐ Is blind

(1) First name Last name		(2) Social security number	(3) Relationship to you	(4) Check the box if qualifies for (see inst.): Child tax credit Credit for other dependents	
				☐	☐
				☐	☐
				☐	☐

Income Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.	1a	Total amount from Form(s) W-2, box 1 (see instructions)	1a	73,833
	b	Household employee wages not reported on Form(s) W-2	1b	
	c	Tip income not reported on line 1a (see instructions)	1c	
	d	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)	1d	
	e	Taxable dependent care benefits from Form 2441, line 26	1e	
	f	Employer-provided adoption benefits from Form 8839, line 29	1f	
	g	Wages from Form 8919, line 6	1g	
	h	Other earned income (see instructions)	1h	
	i	Nontaxable combat pay election (see instructions) 1i		
	z	Add lines 1a through 1h	1z	73,833
Attach Sch. B if required.	2a	Tax-exempt interest 2a	2b	200
	3a	Qualified dividends 3a	3b	
	4a	IRA distributions 4a	4b	
	5a	Pensions and annuities 5a	5b	
	6a	Social security benefits 6a	6b	
	c	If you elect to use the lump-sum election method, check here (see instructions) ☐		
	7	Capital gain or (loss). Attach Schedule D if required. If not required, check here ☐	7	
	8	Additional income from Schedule 1, line 10	8	
	9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income	9	74,033
	10	Adjustments to income from Schedule 1, line 26	10	
Standard Deduction for-- • Single or Married filing separately, \$13,850 • Married filing jointly or Qualifying surviving spouse, \$27,700 • Head of household, \$20,800 • If you checked any box under Standard Ded., see instructions.	11	Subtract line 10 from line 9. This is your adjusted gross income	11	74,033
	12	Standard deduction or itemized deductions (from Schedule A)	12	13,850
	13	Qualified business income deduction from Form 8995 or Form 8995-A	13	
	14	Add lines 12 and 13	14	13,850
	15	Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income	15	60,183

Tax and Credits	16 Tax (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐	16	8,546
	17 Amount from Schedule 2, line 3	17	
	18 Add lines 16 and 17	18	8,546
	19 Child tax credit or credit for other dependents from Schedule 8812	19	
	20 Amount from Schedule 3, line 8	20	
	21 Add lines 19 and 20	21	
	22 Subtract line 21 from line 18. If zero or less, enter -0-	22	8,546
	23 Other taxes, including self-employment tax, from Schedule 2, line 21	23	
24 Add lines 22 and 23. This is your total tax	24	8,546	

Payments	25 Federal income tax withheld from:		
	a Form(s) W-2	25a	8,826
	b Form(s) 1099	25b	
	c Other forms (see instructions)	25c	
	d Add lines 25a through 25c	25d	8,826
	26 2023 estimated tax payments and amount applied from 2022 return	26	
	27 Earned income credit (EIC)	27	
	28 Additional child tax credit from Schedule 8812	28	
	29 American opportunity credit from Form 8863, line 8	29	
	30 Reserved for future use	30	
31 Amount from Schedule 3, line 15	31		
32 Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits	32		
33 Add lines 25d, 26, and 32. These are your total payments	33	8,826	

Refund	34 If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	280
	35a Amount of line 34 you want refunded to you . If Form 8888 is attached, check here ☐	35a	280
	b Routing number 091409843 c Type: ☒ Checking ☐ Savings		
	d Account number 322110978671		
	36 Amount of line 34 you want applied to your 2024 estimated tax	36	

Amount You Owe	37 Subtract line 33 from line 24. This is the amount you owe . For details on how to pay, go to www.irs.gov/Payments or see instructions	37	
	38 Estimated tax penalty (see instructions)	38	

Third Party Designee	Do you want to allow another person to discuss this return with the IRS? See instructions ☐ Yes . Complete below. ☒ No		
	Designee's name	Phone no.	Personal identification number (PIN)

Sign Here	Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.			
	Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
	Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)
	Phone no. 4752238838	Email address mhtchangani@gmail.com		

Paid Preparer Use Only	Preparer's name	Preparer's signature	Date	PTIN	Check if: ☐ Self-employed
	Firm's name	Firm's address			Phone no.
					Firm's EIN

Go to www.irs.gov/Form1040 for instructions and the latest information.Form **1040** (2023)

Employee Reference Copy		Wage and Tax Statement		2023	
Copy C for employee's records.		OMB No. 1545-0008			
d Control number	Dept.	Corp.	Employer use only		
302361	CL12/81A	002017	A		
c Employer's name, address, and ZIP code					
WEIL GOTSHAL & MANGES LLP 767 FIFTH AVE NEW YORK NY 10153					
Batch #02484					
e/f Employee's name, address, and ZIP code					
MOHIT CHANGANI 250 E 39TH STREET 3D NEW YORK NY 10016					
b Employer's FED ID number		a Employee's SSA number			
13-1456110		XXX-XX-0824			
1 Wages, tips, other comp.		2 Federal income tax withheld			
73833.48		8825.72			
3 Social security wages		4 Social security tax withheld			
73833.48		4577.68			
5 Medicare wages and tips		6 Medicare tax withheld			
73833.48		1070.59			
7 Social security tips		8 Allocated tips			
9		10 Dependent care benefits			
11 Nonqualified plans		12a See instructions for box 12			
		AA 3810.18			
14 Other		12b DD 12490.68			
30.19 SDI		12c			
346.73 NY PFL		12d			
13 Stat emp.		Ret. plan		3rd party sick pay	
		X			
15 State	Employer's state ID no.	16 State wages, tips, etc.			
NY	13-1456110	73833.48			
17 State income tax	18 Local wages, tips, etc.				
3745.50	73833.48				
19 Local income tax	20 Locality name				
2633.21	NYC RES				

This blue section is your Earnings Summary which provides more detailed information on the generation of your W-2 statement. The reverse side includes instructions and other general information.

1. Your Gross Pay was adjusted as follows to produce your W-2 Statement.

	Wages, Tips, other Compensation Box 1 of W-2	Social Security Wages Box 3 of W-2	Medicare Wages Box 5 of W-2	NY. State Wages, Tips, Etc. Box 16 of W-2
Gross Pay	76,204.23	76,204.23	76,204.23	76,204.23
Less Misc. Non Taxable Comp.	2,370.75	2,370.75	2,370.75	2,370.75
Reported W-2 Wages	73,833.48	73,833.48	73,833.48	73,833.48

2. Employee Name and Address.

MOHIT CHANGANI
250 E 39TH STREET
3D
NEW YORK NY 10016

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1 Wages, tips, other comp.		2 Federal income tax withheld	
73833.48		8825.72	
3 Social security wages		4 Social security tax withheld	
73833.48		4577.68	
5 Medicare wages and tips		6 Medicare tax withheld	
73833.48		1070.59	
d Control number	Dept.	Corp.	Employer use only
302361	CL12/81A	002017	A
c Employer's name, address, and ZIP code			
WEIL GOTSHAL & MANGES LLP 767 FIFTH AVE NEW YORK NY 10153			
b Employer's FED ID number		a Employee's SSA number	
13-1456110		XXX-XX-0824	
7 Social security tips		8 Allocated tips	
9		10 Dependent care benefits	
11 Nonqualified plans		12a See instructions for box 12	
		AA 3810.18	
14 Other		12b DD 12490.68	
30.19 SDI		12c	
346.73 NY PFL		12d	
13 Stat emp.		Ret. plan	
		X	
e/f Employee's name, address and ZIP code			
MOHIT CHANGANI 250 E 39TH STREET 3D NEW YORK NY 10016			
15 State	Employer's state ID no.	16 State wages, tips, etc.	
NY	13-1456110	73833.48	
17 State income tax	18 Local wages, tips, etc.		
3745.50	73833.48		
19 Local income tax	20 Locality name		
2633.21	NYC RES		
Federal Filing Copy			
W-2		2023	
Copy B to be filed with employee's Federal Income Tax Return.		OMB No. 1545-0008	

1 Wages, tips, other comp.		2 Federal income tax withheld	
73833.48		8825.72	
3 Social security wages		4 Social security tax withheld	
73833.48		4577.68	
5 Medicare wages and tips		6 Medicare tax withheld	
73833.48		1070.59	
d Control number	Dept.	Corp.	Employer use only
302361	CL12/81A	002017	A
c Employer's name, address, and ZIP code			
WEIL GOTSHAL & MANGES LLP 767 FIFTH AVE NEW YORK NY 10153			
b Employer's FED ID number		a Employee's SSA number	
13-1456110		XXX-XX-0824	
7 Social security tips		8 Allocated tips	
9		10 Dependent care benefits	
11 Nonqualified plans		12a See instructions for box 12	
		AA 3810.18	
14 Other		12b DD 12490.68	
30.19 SDI		12c	
346.73 NY PFL		12d	
13 Stat emp.		Ret. plan	
		X	
e/f Employee's name, address and ZIP code			
MOHIT CHANGANI 250 E 39TH STREET 3D NEW YORK NY 10016			
15 State	Employer's state ID no.	16 State wages, tips, etc.	
NY	13-1456110	73833.48	
17 State income tax	18 Local wages, tips, etc.		
3745.50	73833.48		
19 Local income tax	20 Locality name		
2633.21	NYC RES		
NY. State Reference Copy			
W-2		2023	
Copy 2 to be filed with employee's State Income Tax Return.		OMB No. 1545-0008	

1 Wages, tips, other comp.		2 Federal income tax withheld	
73833.48		8825.72	
3 Social security wages		4 Social security tax withheld	
73833.48		4577.68	
5 Medicare wages and tips		6 Medicare tax withheld	
73833.48		1070.59	
d Control number	Dept.	Corp.	Employer use only
302361	CL12/81A	002017	A
c Employer's name, address, and ZIP code			
WEIL GOTSHAL & MANGES LLP 767 FIFTH AVE NEW YORK NY 10153			
b Employer's FED ID number		a Employee's SSA number	
13-1456110		XXX-XX-0824	
7 Social security tips		8 Allocated tips	
9		10 Dependent care benefits	
11 Nonqualified plans		12a See instructions for box 12	
		AA 3810.18	
14 Other		12b DD 12490.68	
30.19 SDI		12c	
346.73 NY PFL		12d	
13 Stat emp.		Ret. plan	
		X	
e/f Employee's name, address and ZIP code			
MOHIT CHANGANI 250 E 39TH STREET 3D NEW YORK NY 10016			
15 State	Employer's state ID no.	16 State wages, tips, etc.	
NY	13-1456110	73833.48	
17 State income tax	18 Local wages, tips, etc.		
3745.50	73833.48		
19 Local income tax	20 Locality name		
2633.21	NYC RES		
NY. State Filing Copy			
W-2		2023	
Copy 2 to be filed with employee's State Income Tax Return.		OMB No. 1545-0008	

City or Local Reference Copy		Wage and Tax Statement		2023	
OMB No. 1545-0008					
d Control number		Dept.	Corp.	Employer use only	
302361 CL12/81A		002017		A	
c Employer's name, address, and ZIP code					
WEIL GOTSHAL & MANGES LLP 767 FIFTH AVE NEW YORK NY 10153					
Batch #02484					
e/f Employee's name, address, and ZIP code					
MOHIT CHANGANI 250 E 39TH STREET 3D NEW YORK NY 10016					
b Employer's FED ID number		a Employee's SSA number			
13-1456110		XXX-XX-0824			
1 Wages, tips, other comp.		2 Federal income tax withheld			
73833.48		8825.72			
3 Social security wages		4 Social security tax withheld			
73833.48		4577.68			
5 Medicare wages and tips		6 Medicare tax withheld			
73833.48		1070.59			
7 Social security tips		8 Allocated tips			
9		10 Dependent care benefits			
11 Nonqualified plans		12a See instructions for box 12			
		AA 3810.18			
14 Other		12b DD 12490.68			
30.19 SDI		12c			
		12d			
		13 Stat emp Ret. plan 3rd party sick pay			
		X			
15 State	Employer's state ID no.	16 State wages, tips, etc.			
17 State income tax		18 Local wages, tips, etc.			
		73833.48			
19 Local income tax		20 Locality name			
2633.21		NYC RES			

1. Your Gross Pay was adjusted as follows to produce your W-2 Statement.

	NYC RES
	Local Wages,
	Tips, Etc.
	Box 18 of W-2
Gross Pay	76,204.23
Less Misc. Non Taxable Comp.	2,370.75
Reported W-2 Wages	73,833.48

2. Employee Name and Address.

MOHIT CHANGANI
250 E 39TH STREET
3D
NEW YORK NY 10016

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1 Wages, tips, other comp.		2 Federal income tax withheld	
73833.48		8825.72	
3 Social security wages		4 Social security tax withheld	
73833.48		4577.68	
5 Medicare wages and tips		6 Medicare tax withheld	
73833.48		1070.59	
d Control number	Dept.	Corp.	Employer use only
302361 CL12/81A	002017		A
c Employer's name, address, and ZIP code			
WEIL GOTSHAL & MANGES LLP 767 FIFTH AVE NEW YORK NY 10153			
b Employer's FED ID number		a Employee's SSA number	
13-1456110		XXX-XX-0824	
7 Social security tips		8 Allocated tips	
9		10 Dependent care benefits	
11 Nonqualified plans		12a See instructions for box 12	
		AA 3810.18	
14 Other		12b DD 12490.68	
30.19 SDI		12c	
		12d	
		13 Stat emp Ret. plan 3rd party sick pay	
		X	
15 State	Employer's state ID no.	16 State wages, tips, etc.	
17 State income tax		18 Local wages, tips, etc.	
		73833.48	
19 Local income tax		20 Locality name	
2633.21		NYC RES	
City or Local Filing Copy			
W-2 Wage and Tax Statement			
OMB No. 1545-0008			
Copy 2 to be filed with employee's City or Local Income Tax Return.			

INTENTIONALLY
LEFT BLANK

Instructions for Employee

Box 1. Enter this amount on the wages line of your tax return.

Box 2. Enter this amount on the federal income tax withheld line of your tax return.

Box 5. You may be required to report this amount on Form 8959. See the Form 1040 instructions to determine if you are required to complete Form 8959.

Box 6. This amount includes the 1.45% Medicare tax withheld on all Medicare wages and tips shown in box 5, as well as the 0.9% Additional Medicare Tax on any of those Medicare wages and tips above \$200,000.

Box 8. This amount is **not** included in box 1, 3, 5, or 7. For information on how to report tips on your tax return, see the Form 1040 instructions.

You must file Form 4137 with your income tax return to report at least the allocated tip amount unless you can prove with adequate records that you received a smaller amount. If you have records that show the actual amount of tips you received, report that amount even if it is more or less than the allocated tips. Use Form 4137 to figure the social security and Medicare tax owed on tips you didn't report to your employer. Enter this amount on the wages line of your tax return. By filing Form 4137, your social security tips will be credited to your social security record (used to figure your benefits).

Box 10. This amount includes the total dependent care benefits that your employer paid to you or incurred on your behalf (including amounts from a section 125 (cafeteria) plan). Any amount over your employer's plan limit is also included in box 1. See Form 2441.

Box 11. This amount is (a) reported in box 1 if it is a distribution made to you from a nonqualified deferred compensation or nongovernmental section 457(b) plan, or (b) included in box 3 and/or box 5 if it is a prior year deferral under a nonqualified or section 457(b) plan that became taxable for social security and Medicare taxes this year because there is no longer a substantial risk of forfeiture of your right to the deferred amount. This box shouldn't be used if you had a deferral and a distribution in the same calendar year. If you made a deferral and received a distribution in the same calendar year, and you are or will be age 62 by the end of the calendar year, your employer should file Form SSA-131, Employer Report of Special Wage Payments, with the Social Security Administration and give you a copy.

Box 12. The following list explains the codes shown in box 12. You may need this information to complete your tax return. Elective deferrals (codes D, E, F, and S) and designated Roth contributions (codes AA, BB, and EE) under all plans are generally limited to a total of \$22,500 (\$15,500 if you only have SIMPLE plans; \$25,500 for section 403(b) plans if you qualify for the 15-year rule explained in Pub. 571). Deferrals under code G are limited to \$22,500. Deferrals under code H are limited to \$7,000.

However, if you were at least age 50 in 2023, your employer may have allowed an additional deferral of up to \$7,500 (\$3,500 for section 401(k) (11) and 408(p) SIMPLE plans). This additional deferral amount is not subject to the overall limit on elective deferrals. For code G, the limit on elective deferrals may be higher for the last 3 years before you reach retirement age. Contact your plan administrator for more information. Amounts in excess of the overall elective deferral limit must be included in income. See the Form 1040 instructions.

Note: If a year follows code D through H, S, Y, AA, BB, or EE, you made a make-up pension contribution for a prior year(s) when you were in military service. To figure whether you made excess deferrals, consider these amounts for the year shown, not the current year. If no year is shown, the contributions are for the current year.

- A**—Uncollected social security or RRTA tax on tips. Include this tax on Form 1040 or 1040-SR. See the Form 1040 instructions.
- B**—Uncollected Medicare tax on tips. Include this tax on Form 1040 or 1040-SR. See the Form 1040 instructions.
- C**—Taxable cost of group-term life insurance over \$50,000 (included in boxes 1, 3 (up to the social security wage base), and 5)
- D**—Elective deferrals to a section 401(k) cash or deferred arrangement. Also includes deferrals under a SIMPLE retirement account that is part of a section 401(k) arrangement.
- E**—Elective deferrals under a section 403(b) salary reduction agreement
- F**—Elective deferrals under a section 408(k)(6) salary reduction SEP
- G**—Elective deferrals and employer contributions (including nonelective deferrals) to a section 457(b) deferred compensation plan
- H**—Elective deferrals to a section 501(c)(18)(D) tax-exempt organization plan. See the Form 1040 instructions for how to deduct.
- J**—Nontaxable sick pay (information only, not included in box 1, 3, or 5)
- K**—20% excise tax on excess golden parachute payments. See the Form 1040 instructions.
- L**—Substantiated employee business expense reimbursements (nontaxable)
- M**—Uncollected social security or RRTA tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See the Form 1040 instructions.
- N**—Uncollected Medicare tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See the Form 1040 instructions.
- P**—Excludable moving expense reimbursements paid directly to a member of the U.S. Armed Forces (not included in box 1, 3, or 5)
- Q**—Nontaxable combat pay. See the Form 1040 instructions for details on reporting this amount.
- R**—Employer contributions to your Archer MSA. Report on Form 8853.

- S**—Employee salary reduction contributions under a section 408(p) SIMPLE plan (not included in box 1)
- T**—Adoption benefits (not included in box 1). Complete Form 8839 to figure any taxable and nontaxable amounts.
- V**—Income from exercise of nonstatutory stock option(s) (included in boxes 1, 3 (up to the social security wage base), and 5). See Pub. 525 for reporting requirements.
- W**—Employer contributions (including amounts the employee elected to contribute using a section 125 (cafeteria) plan) to your health savings account. Report on Form 8889.
- Y**—Deferrals under a section 409A nonqualified deferred compensation plan
- Z**—Income under a nonqualified deferred compensation plan that fails to satisfy section 409A. This amount is also included in box 1. It is subject to an additional 20% tax plus interest. See the Form 1040 instructions.
- AA**—Designated Roth contributions under a section 401(k) plan
- BB**—Designated Roth contributions under a section 403(b) plan
- DD**—Cost of employer-sponsored health coverage. **The amount reported with code DD is not taxable.**
- EE**—Designated Roth contributions under a governmental section 457(b) plan. This amount does not apply to contributions under a tax-exempt organization section 457(b) plan.
- FF**—Permitted benefits under a qualified small employer health reimbursement arrangement
- GG**—Income from qualified equity grants under section 83(i)
- HH**—Aggregate deferrals under section 83(i) elections as of the close of the calendar year

Box 13. If the "Retirement plan" box is checked, special limits may apply to the amount of traditional IRA contributions you may deduct. See Pub. 590-A.

Box 14. Employers may use this box to report information such as state disability insurance taxes withheld, union dues, uniform payments, health insurance premiums deducted, nontaxable income, educational assistance payments, or a member of the clergy's parsonage allowance and utilities. Railroad employers use this box to report railroad retirement (RRTA) compensation, Tier 1 tax, Tier 2 tax, Medicare tax, and Additional Medicare Tax. Include tips reported by the employee to the employer in railroad retirement (RRTA) compensation.

Note: Keep **Copy C** of Form W-2 for at least 3 years after the due date for filing your income tax return. However, to help **protect your social security benefits**, keep Copy C until you begin receiving social security benefits, just in case there is a question about your work record and/or earnings in a particular year.

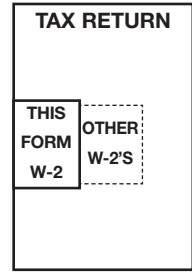
Department of the Treasury - Internal Revenue Service

NOTE: THESE ARE SUBSTITUTE WAGE AND TAX STATEMENTS AND ARE ACCEPTABLE FOR FILING WITH YOUR FEDERAL, STATE AND LOCAL/CITY INCOME TAX RETURNS.

This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.

IMPORTANT NOTE:

In order to insure efficient processing, attach this W-2 to your tax return like this (following agency instructions):



Notice to Employee

Do you have to file? Refer to the Form 1040 instructions to determine if you are required to file a tax return. Even if you don't have to file a tax return, you may be eligible for a refund if box 2 shows an amount or if you are eligible for any credit.

Earned income credit (EIC). You may be able to take the EIC for 2023 if your adjusted gross income (AGI) is less than a certain amount. The amount of the credit is based on income and family size. Workers without children could qualify for a smaller credit. You and any qualifying children must have valid social security numbers (SSNs). You can't take the EIC if your investment income is more than the specified amount for 2023 or if income is earned for services provided while you were an inmate at a penal institution. For 2023 income limits and more information, visit www.irs.gov/EITC. See also Pub. 596. **Any EIC that is more than your tax liability is refunded to you, but only if you file a tax return.**

Employee's social security number (SSN). For your protection, this form may show only the last four digits of your SSN. However, your employer has reported your complete SSN to the IRS and the Social Security Administration (SSA).

Clergy and religious workers. If you aren't subject to social security and Medicare taxes, see Pub. 517.

Corrections. If your name, SSN, or address is incorrect, correct Copies B, C, and 2 and ask your employer to correct your employment record. Be sure to ask the employer to file Form W-2c, Corrected Wage and Tax Statement, with the SSA to correct any name, SSN, or money amount error reported to the SSA on Form W-2. Be sure to get your copies of Form W-2c from your employer for all corrections made so you may file them with your tax return. If your name and SSN are correct but aren't the same as shown on your social security card, you should ask for a new card that displays your correct name at any SSA office or by calling 800-772-1213. You may also visit the SSA website at www.SSA.gov.

Cost of employer-sponsored health coverage (if such cost is provided by the employer). The reporting in box 12, using code DD, of the cost of employer-sponsored health coverage is for your information only. **The amount reported with code DD is not taxable.**

Credit for excess taxes. If you had more than one employer in 2023 and more than \$9,932.40 in social security and/or Tier 1 railroad retirement (RRTA) taxes were withheld, you may be able to claim a credit for the excess against your federal income tax. See the Form 1040 instructions. If you had more than one railroad employer and more than \$5,821.20 in Tier 2 RRTA tax was withheld, you may be able to claim a refund on Form 843. See the Instructions for Form 843.



JPMorgan Chase Bank, N.A.
P O Box 182051
Columbus, OH 43218 - 2051

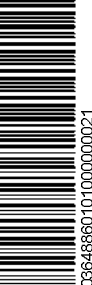
July 10, 2024 through August 08, 2024
Account Number: **000000512560569**

CUSTOMER SERVICE INFORMATION

Web site: **Chase.com**
Service Center: **1-800-935-9935**
Para Espanol: **1-877-312-4273**
International Calls: **1-713-262-1679**
We accept operator relay calls

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MOHIT K CHANGAN
250 E 39TH ST APT 3D
NEW YORK NY 10016-2114



CHECKING SUMMARY

Chase Total Checking

	AMOUNT
Beginning Balance	\$19,956.53
Deposits and Additions	7,309.48
ATM & Debit Card Withdrawals	-163.95
Electronic Withdrawals	-7,226.18
Fees	-3.00
Ending Balance	\$19,872.88

TRANSACTION DETAIL

DATE	DESCRIPTION	AMOUNT	BALANCE
	Beginning Balance		\$19,956.53
07/12	Con Ed of NY Cecony 07919120001 CCD ID: 2462467002	-113.23	19,843.30
07/15	Asf, Dba Insuper Payroll PPD ID: 3760487432	2,429.24	22,272.54
07/16	Wells Fargo Ifi DDA To DDA PPD ID: Intfitrvos	1,045.00	23,317.54
07/16	Venmo Cashout PPD ID: 5264681992	112.00	23,429.54
07/16	Venmo Cashout PPD ID: 5264681992	38.00	23,467.54
07/16	Venmo Cashout PPD ID: 5264681992	33.00	23,500.54
07/18	07/17 Payment To Chase Card Ending IN 9907	-1,045.00	22,455.54
07/23	Wells Fargo Ifi DDA To DDA PPD ID: Intfitrvos	863.00	23,318.54
07/29	ATM Cash Deposit 07/27 3231 E Pecos Rd Gilbert AZ Card 7056	360.00	23,678.54
07/29	Non-Chase ATM Withdraw 07/27 1077 South Kyrene Road Chandler AZ Card 7056	-163.95	23,514.59
07/29	Non-Chase ATM Fee-With	-3.00	23,511.59
07/31	Asf, Dba Insuper Payroll PPD ID: 3760487432	2,429.24	25,940.83
07/31	07/31 Online Realtime Transfer To Wells Fargo Bank, National Assoc 4242 Transaction#: 21573705693 Reference#: 9573705693Rx	-106.27	25,834.56
07/31	07/31 Online Realtime Transfer To Wells Fargo Bank, National Assoc 4242 Transaction#: 21573702489 Reference#: 9573702489Rx	-0.24	25,834.32
08/02	Chase Credit Crd Autopay PPD ID: 4760039224	-3,705.22	22,129.10
08/02	Chase Credit Crd Autopay PPD ID: 4760039224	-2,055.90	20,073.20
08/02	Chase Credit Crd Autopay PPD ID: 4760039224	-200.32	19,872.88
	Ending Balance		\$19,872.88

A Monthly Service Fee was **not** charged to your Chase Total Checking account. Here are the three ways you can avoid this fee during any statement period.



July 10, 2024 through August 08, 2024
Account Number: **000000512560569**

- **Have electronic deposits made into this account totaling \$500.00 or more, such as payments from payroll providers or government benefit providers, by using (i) the ACH network, (ii) the Real Time Payment or FedNowSM network, or (iii) third party services that facilitate payments to your debit card using the Visa or Mastercard network.**
(Your total electronic deposits this period were \$6,949.48. Note: some deposits may be listed on your previous statement)
- **OR, keep a balance at the beginning of each day of \$1,500.00 or more in this account.**
(Your lowest beginning day balance was \$19,843.30)
- **OR, keep an average beginning day balance of \$5,000.00 or more in qualifying linked deposits and investments.**
(Your average beginning day balance of qualifying linked deposits and investments was \$21,959.70)

IN CASE OF ERRORS OR QUESTIONS ABOUT YOUR ELECTRONIC FUNDS TRANSFERS:

Call us at 1-866-564-2262 or write us at the address on the front of this statement immediately if you think your statement or receipt is incorrect or if you need more information about a transfer listed on the statement or receipt.

For personal accounts only: We must hear from you no later than 60 days after we sent you the FIRST statement on which the problem or error appeared. Be prepared to give us the following information:

- Your name and account number;
- A description of the error or the transaction you are unsure about, and why you think it is an error or want more information; and
- The amount of the suspected error.

We will investigate your complaint and will correct any error promptly. If we take more than 10 business days (or 20 business days for new accounts) to do this, we will credit your account for the amount you think is in error so that you will have use of the money during the time it takes us to complete our investigation.

For business accounts, see your deposit account agreement or other applicable agreements that govern your account for details.

IN CASE OF ERRORS OR QUESTIONS ABOUT NON-ELECTRONIC FUNDS TRANSFERS: Contact us immediately if your statement is incorrect or if you need more information about any non-electronic funds transfers on this statement. For more details, see your deposit account agreement or other applicable agreements that govern your account.

JPMorgan Chase Bank, N.A. Member FDIC



JPMorgan Chase Bank, N.A.
P O Box 182051
Columbus, OH 43218 - 2051

May 09, 2024 through June 10, 2024

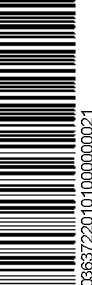
Account Number: **000000512560569**

CUSTOMER SERVICE INFORMATION

Web site: **Chase.com**
Service Center: **1-800-935-9935**
Para Espanol: **1-877-312-4273**
International Calls: **1-713-262-1679**
We accept operator relay calls

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MOHIT K CHANGAN
250 E 39TH ST APT 3D
NEW YORK NY 10016-2114



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CHECKING SUMMARY

Chase Total Checking

	AMOUNT
Beginning Balance	\$22,555.66
Deposits and Additions	6,285.48
ATM & Debit Card Withdrawals	-110.00
Electronic Withdrawals	-5,924.03
Fees	-3.00
Ending Balance	\$22,804.11

TRANSACTION DETAIL

DATE	DESCRIPTION	AMOUNT	BALANCE
	Beginning Balance		\$22,555.66
05/13	Non-Chase ATM Withdraw 05/11 50 West 33Rd Street New York NY Card 7056	-110.00	22,445.66
05/13	Non-Chase ATM Fee-With	-3.00	22,442.66
05/14	Con Ed of NY Cecony 07919120001 CCD ID: 2462467002	-40.80	22,401.86
05/15	Asf, DbA Insuper Payroll PPD ID: 3760487432	2,429.24	24,831.10
05/16	Venmo Payment 1034403959717 Web ID: 3264681992	-400.00	24,431.10
05/16	Venmo Payment 1034403931317 Web ID: 3264681992	-145.00	24,286.10
05/16	Venmo Payment 1034403950869 Web ID: 3264681992	-86.77	24,199.33
05/17	Zelle Payment To Patrick Cleaner Jpm99Ah8Hzgg	-50.00	24,149.33
05/20	Venmo Cashout PPD ID: 5264681992	251.00	24,400.33
05/20	Venmo Cashout PPD ID: 5264681992	69.00	24,469.33
05/20	Venmo Payment 1034445104358 Web ID: 3264681992	-337.00	24,132.33
05/20	Venmo Payment 1034466276440 Web ID: 3264681992	-132.00	24,000.33
05/23	Venmo Cashout PPD ID: 5264681992	10.00	24,010.33
05/31	Asf, DbA Insuper Payroll PPD ID: 3760487432	2,429.24	26,439.57
05/31	Venmo Payment 1034724242121 Web ID: 3264681992	-50.00	26,389.57
06/03	Venmo Cashout PPD ID: 5264681992	182.00	26,571.57
06/03	Venmo Payment 1034733986437 Web ID: 3264681992	-65.00	26,506.57
06/03	Chase Credit Crd Autopay PPD ID: 4760039224	-3,029.09	23,477.48
06/03	Chase Credit Crd Autopay PPD ID: 4760039224	-1,574.23	21,903.25



May 09, 2024 through June 10, 2024
Account Number: 000000512560569

TRANSACTION DETAIL (continued)

DATE	DESCRIPTION	PPD ID	AMOUNT	BALANCE
06/03	Chase Credit Crd Autopay	PPD ID: 4760039224	-14.14	21,889.11
06/06	Gigapower LLC1 Trade Pay V-000754	CCD ID: 1880822930	49.00	21,938.11
06/10	Venmo Cashout	PPD ID: 5264681992	866.00	22,804.11
Ending Balance				\$22,804.11

A Monthly Service Fee was **not** charged to your Chase Total Checking account. Here are the three ways you can avoid this fee during any statement period.

- **Have electronic deposits made into this account totaling \$500.00 or more, such as payments from payroll providers or government benefit providers, by using (i) the ACH network, (ii) the Real Time Payment or FedNowSM network, or (iii) third party services that facilitate payments to your debit card using the Visa or Mastercard network.**
(Your total electronic deposits this period were \$8,404.77. Note: some deposits may be listed on your previous statement)
- **OR, keep a balance at the beginning of each day of \$1,500.00 or more in this account.**
(Your lowest beginning day balance was \$21,889.11)
- **OR, keep an average beginning day balance of \$5,000.00 or more in qualifying linked deposits and investments.**
(Your average beginning day balance of qualifying linked deposits and investments was \$23,508.28)

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- A description of the error or the transaction you are unsure about, and why you think it is an error or want more information; and
- The amount of the suspected error.

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For business accounts, see your deposit account agreement or other applicable agreements that govern your account for details.

IN CASE OF ERRORS OR QUESTIONS ABOUT NON-ELECTRONIC FUNDS TRANSFERS: Contact us immediately if your statement is incorrect or if you need more information about any non-electronic funds transfers on this statement. For more details, see your deposit account agreement or other applicable agreements that govern your account.

JPMorgan Chase Bank, N.A. Member FDIC



JPMorgan Chase Bank, N.A.
P O Box 182051
Columbus, OH 43218 - 2051

June 11, 2024 through July 09, 2024

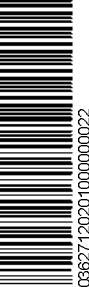
Account Number: **000000512560569**

CUSTOMER SERVICE INFORMATION

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Para Espanol: **1-877-312-4273**
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We accept operator relay calls

00362712 DRE 802 219 19224 NNNNNNNNNN 1 000000000 06 0000

MOHIT K CHANGANI
250 E 39TH ST APT 3D
NEW YORK NY 10016-2114



Good news – we reduced the Non-Chase ATM Fee in several U.S. territories

As of February 20, 2024, we reduced the Non-Chase ATM Fee to \$3 (previously \$5) in American Samoa, Guam and the Northern Mariana Islands. We'll continue to waive this fee for eligible accounts and the ATM owner/network will still charge a Surcharge Fee.¹ You won't be charged these fees when you use a Chase ATM.

For more information, please see the Fee Schedule in the **Additional Banking Services and Fees** at chase.com/disclosures.

If you have any questions, please call us at the number listed on this statement. We accept operator relay calls.

¹For Chase SapphireSM Checking, Chase Private Client CheckingSM and Chase Private Client SavingsSM accounts, we waive the Chase fee and refund ATM Surcharge Fees charged to you at non-Chase ATMs. For Chase Premier Plus CheckingSM, we waive the Chase fee for the first four Non-Chase ATM transactions each statement period.

Please review our overdraft service options at the end of this statement

We've included an overview of our overdraft services and fees that are available for personal checking account(s) at the end of this statement.

Please note, the following overdraft services are not available for certain accounts:

- Standard Overdraft Practice and Chase Debit Card CoverageSM are not available for Chase High School CheckingSM, Chase Secure CheckingSM and Chase First CheckingSM.
- Overdraft Protection is not available for Chase Secure CheckingSM and Chase First CheckingSM.

If you have questions, please visit chase.com/overdraft or call us at the number on this statement. We accept operator relay calls.

We updated the Digital Services Agreement and digital Transfers Terms & Conditions

To help protect your account, we've updated our terms for our Transfers Service. We now determine the limit for each external transfer (a transfer between your eligible Chase account and an external account you've added to your online profile) based on internal Chase criteria at the time you schedule the transfer, rather than applying predetermined limits. The new terms may affect your maximum daily external transfer limit.

You can see the new terms in section 1.2 of the Digital Services Agreement, Addendum: Transfers Service or in the Transfers Agreement.

How to view the Digital Services Agreement or Transfers Agreement:

- On chase.com after you log in to your account, click on the Main Menu then select "Agreements & disclosures."
- On the Chase Mobile[®] app, select "Legal information" from Profile & Settings or at the bottom of the home page, then "Legal agreements and disclosures."



CHECKING SUMMARY		Chase Total Checking
		AMOUNT
Beginning Balance		\$22,804.11
Deposits and Additions		7,891.59
Electronic Withdrawals		-10,739.17
Ending Balance		\$19,956.53

TRANSACTION DETAIL				AMOUNT	BALANCE
					Beginning Balance
					\$22,804.11
06/11	Venmo	Cashout	PPD ID: 5264681992	866.00	23,670.11
06/11	Wise Inc	Maditya Ja	PPD ID: 453233521	866.00	24,536.11
06/11	06/11 Payment To Chase Card Ending IN 8385			-3,444.00	21,092.11
06/13	Con Ed of NY	Cecony	07919120001 CCD ID: 2462467002	-88.11	21,004.00
06/14	Asf, Dba Insperi Payroll		PPD ID: 3760487432	2,429.24	23,433.24
06/14	Venmo	Cashout	PPD ID: 5264681992	283.00	23,716.24
06/14	Venmo	Cashout	PPD ID: 5264681992	34.11	23,750.35
06/17	Venmo	Payment	1035034448208 Web ID: 3264681992	-55.00	23,695.35
06/21	Venmo	Payment	1035159828618 Web ID: 3264681992	-300.00	23,395.35
06/27	Wise Inc	Wise	PPD ID: 9453233521	-1,105.15	22,290.20
06/27	06/27 Payment To Chase Card Ending IN 9907			-5,198.01	17,092.19
06/27	06/27 Payment To Chase Card Ending IN 9265			-548.90	16,543.29
06/28	Asf, Dba Insperi Payroll		PPD ID: 3760487432	2,429.24	18,972.53
06/28	Venmo	Cashout	PPD ID: 5264681992	984.00	19,956.53
	Ending Balance				\$19,956.53

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(Your total electronic deposits this period were \$8,806.59. Note: some deposits may be listed on your previous statement)
- **OR, keep a balance at the beginning of each day of \$1,500.00 or more in this account.**
(Your lowest beginning day balance was \$16,543.29)
- **OR, keep an average beginning day balance of \$5,000.00 or more in qualifying linked deposits and investments.**
(Your average beginning day balance of qualifying linked deposits and investments was \$21,671.10)



June 11, 2024 through July 09, 2024

Account Number: **000000512560569**

IN CASE OF ERRORS OR QUESTIONS ABOUT YOUR ELECTRONIC FUNDS TRANSFERS:

Call us at 1-866-564-2262 or write us at the address on the front of this statement immediately if you think your statement or receipt is incorrect or if you need more information about a transfer listed on the statement or receipt.

For personal accounts only: We must hear from you no later than 60 days after we sent you the FIRST statement on which the problem or error appeared. Be prepared to give us the following information:

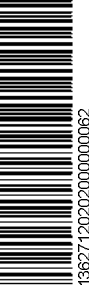
- Your name and account number;
- A description of the error or the transaction you are unsure about, and why you think it is an error or want more information; and
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We will investigate your complaint and will correct any error promptly. If we take more than 10 business days (or 20 business days for new accounts) to do this, we will credit your account for the amount you think is in error so that you will have use of the money during the time it takes us to complete our investigation.

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JPMorgan Chase Bank, N.A. Member FDIC





Overdraft and Overdraft Fee Information for Your Chase Checking Account

What You Need to Know About Overdrafts and Overdraft Fees

An overdraft occurs when you do not have enough money in your account to cover a transaction, but we pay it anyway. Whether your account has enough money to cover a transaction is determined during our nightly processing. During our nightly processing, we take your previous end of day's balance and post credits. If there are any deposits not yet available for use or holds (such as a garnishment), these will reduce the account balance used to pay your transactions. Then we subtract any debit transactions presented during our nightly processing. The available balance shown to you during the day may not be the same amount used to pay your transactions as some transactions may not be displayed to you before nightly processing.

We pay overdrafts at our discretion, which means we do not guarantee that we will always authorize or pay any transactions presented for payment. If we do not authorize an overdraft, your transaction will be declined. If we do not pay an overdraft, your transaction will be returned. Additional information about overdrafts and your account features can be found in the *Deposit Account Agreement*.

We can cover your overdrafts in three different ways:

1. We have a Standard Overdraft Practice that comes with your account.
2. We offer Overdraft Protection through a link to a Chase savings account, which may be less expensive than our Standard Overdraft Practice. You can contact us to learn more.
3. We also offer Chase Debit Card CoverageSM, which allows you to choose how we treat your everyday debit card transactions (e.g. groceries, gasoline or dining out), in addition to our Standard Overdraft Practice.

This notice explains our Standard Overdraft Practice and Chase Debit Card Coverage.

- **What is the Standard Overdraft Practice that comes with my account?**

We **do** authorize and pay overdrafts for the following types of transactions:

- Checks and other transactions made using your checking account number
- Recurring debit card transactions (e.g. movie subscriptions or gym memberships)

- **What is Chase Debit Card Coverage?**

If you enroll in Chase Debit Card Coverage we **may** authorize and pay overdrafts for **everyday debit card transactions** (e.g. groceries, gasoline or dining out) in addition to our Standard Overdraft Practice.

- **What fees will I be charged if Chase pays my overdraft?**

If we authorize and pay an overdraft, we'll charge you a \$34 Overdraft Fee per transaction during our nightly processing beginning with the first transaction that overdraws your account balance by more than \$50 (maximum of 3 fees per business day, up to \$102).

We won't charge you an Overdraft Fee in the following circumstances:

- With Chase Overdraft AssistSM, we won't charge an Overdraft Fee if you're overdrawn by \$50 or less at the end of the business day **OR** if you're overdrawn by more than \$50 and you bring your account balance to overdrawn by \$50 or less at the end of the next business day (you have until 11 p.m ET (8 p.m PT) to make a deposit or transfer). Chase Overdraft Assist does not require enrollment and comes with eligible Chase checking accounts.
- We won't charge an Overdraft Fee for transactions that are \$5 or less.
- We won't charge an Overdraft Fee if your debit card transaction was authorized when there was a sufficient available balance in your account.
- For Chase SapphireSM Checking and Chase Private Client CheckingSM accounts, there are no Overdraft Fees when item(s) are presented against an account with insufficient funds on the first four business days during the current and prior 12 statement periods. On a business day when we returned item(s), this counts toward the four business days when an Overdraft Fee will not be charged.

- **What if I want Chase to authorize and pay overdrafts on my everyday debit card transactions?**

If you or a joint account owner want Chase to authorize overdrafts on your everyday debit card transactions, please make your Chase Debit Card Coverage selection. You can change your Chase Debit Card Coverage selection at any time by signing in to chase.com or Chase Mobile[®] to update your account settings, calling us at 1-800-935-9935 (or at 1-713-262-1679 if outside the U.S.), or visiting a Chase branch. We accept operator relay calls.



Did You Know That Insperity Premier(TM) is the Place to Go for your...

1. Personal employment information 2. Current and past paycheck records, W2 and W4 forms 3. Health insurance information and credentials 4. 401(k) plan account (if you have one) 5. Flexible spending account (FSA) plan or HSA (if you have one) 6. Insperity contact information and tutorials/overview videos 7. MarketPlace(SM) access

Just log in to portal.insperity.com for easy and instant access to this important information and much more!

Employee: CHANGANI, MOHIT

Employee ID: 4476529

Check #:
83860586

Company: GIGAPOWERS, LLC (5646500)

311 S AKARD ST FL 21

DALLAS, TX 75202

Phone: (469) 563 5667

Pay Date: 08/15/2024

PayPeriod: 08/01/2024 To
08/15/2024

Pay Frequency: SemiMonthly

Pay Type: Salary

Department: 5000

Location: 0

Gross Earnings: 3,833.33

Total Taxes: 1,119.09

Total Deductions: 285.00

Net Pay: 2,429.24

Earnings

Description	Start Date	End Date	Hrs/Units	Rate	Current	YTD
Current Pay Period						
Salary - Exempt	08/01/2024	08/15/2024		3,833.33	3,833.33	34,499.97
Gross					3,833.33	34,499.97

Deductions & Credits

Description	Current	YTD	Description	Current	YTD
Pre-Tax			Taxes		
Employee Med	50.00	450.00	Federal Taxes	491.27	4,421.43
Employee D/V	5.00	45.00	NY SIT	184.53	1,660.77
Total	55.00	495.00	NY SDI	1.30	11.70
			New York NY City Tax	138.64	1,247.76
After Tax			SocSec	234.26	2,108.34
401K Roth	230.00	2,070.00	Medicare	54.79	493.11
Total	230.00	2,070.00	NY F.L.I.	14.30	128.70
			Total	1,119.09	10,071.81

Direct Deposit Information

Routing Number	Account Number	Amount
#####0021	#####0569	2,429.24

Federal Tax Withholding Elections

Filing Status: Single or Married filing separately
Two Jobs: No
Claim Dependents: \$ 0.00
Deductions: \$ 0.00
Extra Withholding: \$ 0.00
Exempt: No

Paid Time Off/Vacation and/or Sick Information

Plan - Level	Available	Used	Balance
Your worksite employer provides the Paid Time Off/Vacation and/or Sick Information shown. "Balance" reflects hours available for use under the PTO, vacation, and/or sick time provided to Insperity by your worksite employer. See your supervisor with questions about your Balance. If your Paid Time Off/Vacation and/or Sick Information does not appear, this information will be provided by your worksite employer, as applicable.			

Insperity YTD Taxable Amount

Description	Amount
Federal	34,004.97
Social Security	34,004.97
Medicare	34,004.97

Insperty PEO
Services, L.P.

19001 Crescent Springs Drive, Kingwood, TX 77339-3802

866-715-3552



Did You Know That Insperty Premier(TM) is the Place to Go for your...

1. Personal employment information 2. Current and past paycheck records, W2 and W4 forms 3. Health insurance information and credentials 4. 401(k) plan account (if you have one) 5. Flexible spending account (FSA) plan or HSA (if you have one) 6. Insperty contact information and tutorials/overview videos 7. MarketPlace(SM) access

Just log in to portal.insperty.com for easy and instant access to this important information and much more!

Employee: CHANGANI, MOHIT

Employee ID: 4476529

Check #:
83488598

Company: GIGAPOWER, LLC (5646500)

311 S AKARD ST FL 21

DALLAS, TX 75202

Phone: (469) 563 5667

Pay Date: 07/31/2024

PayPeriod: 07/16/2024 To
07/31/2024

Pay Frequency: SemiMonthly

Pay Type: Salary

Department: 5000

Location: 0

Gross Earnings: 3,833.33

Total Taxes: 1,119.09

Total Deductions: 285.00

Net Pay: 2,429.24

Earnings

Description	Start Date	End Date	Hrs/Units	Rate	Current	YTD
Current Pay Period						
Salary - Exempt	07/16/2024	07/31/2024		3,833.33	3,833.33	30,666.64
Gross					3,833.33	30,666.64

Deductions & Credits

Description	Current	YTD	Description	Current	YTD
Pre-Tax					
Employee Med	50.00	400.00	Federal Taxes	491.27	3,930.16
Employee D/V	5.00	40.00	NY SIT	184.53	1,476.24
Total	55.00	440.00	NY SDI	1.30	10.40
			New York NY City Tax	138.64	1,109.12
After Tax			SocSec	234.26	1,874.08
401K Roth	230.00	1,840.00	Medicare	54.79	438.32
Total	230.00	1,840.00	NY F.L.I.	14.30	114.40
			Total	1,119.09	8,952.72

Direct Deposit Information

Routing Number Account Number
#####0021 #####0569

Amount
2,429.24

Federal Tax Withholding Elections

Filing Status: Single or Married filing separately

Two Jobs: No

Claim Dependents: \$ 0.00

Deductions: \$ 0.00

Extra Withholding: \$ 0.00

Exempt: No

Paid Time Off/Vacation and/or Sick Information

Plan - Level Available Used Balance

Your worksite employer provides the Paid Time Off/Vacation and/or Sick Information shown. "Balance" reflects hours available for use under the PTO, vacation, and/or sick time provided to Insperty by your worksite employer. See your supervisor with questions about your Balance. If your Paid Time Off/Vacation and/or Sick Information does not appear, this information will be provided by your worksite employer, as applicable.

Insperty YTD Taxable Amount

Description Amount
Federal 30,226.64

Social Security	30,226.64
Medicare	30,226.64

Insperty PEO
Services, L.P.

19001 Crescent Springs Drive, Kingwood, TX 77339-3802

866-715-3552



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Employee: CHANGANI, MOHIT

Employee ID: 4476529

Check #:
83140546

Company: GIGAPOWER, LLC (5646500)

311 S AKARD ST FL 21

DALLAS, TX 75202

Phone: (469) 563 5667

Pay Date: 07/15/2024

PayPeriod: 07/01/2024 To
07/15/2024

Pay Frequency: SemiMonthly

Pay Type: Salary

Department: 5000

Location: 0

Gross Earnings: 3,833.33

Total Taxes: 1,119.09

Total Deductions: 285.00

Net Pay: 2,429.24

Earnings

Description	Start Date	End Date	Hrs/Units	Rate	Current	YTD
Current Pay Period						
Salary - Exempt	07/01/2024	07/15/2024		3,833.33	3,833.33	26,833.31
Gross					3,833.33	26,833.31

Deductions & Credits

Description	Current	YTD	Description	Current	YTD
Pre-Tax			Taxes		
Employee Med	50.00	350.00	Federal Taxes	491.27	3,438.89
Employee D/V	5.00	35.00	NY SIT	184.53	1,291.71
Total	55.00	385.00	NY SDI	1.30	9.10
			New York NY City Tax	138.64	970.48
After Tax			SocSec	234.26	1,639.82
401K Roth	230.00	1,610.00	Medicare	54.79	383.53
Total	230.00	1,610.00	NY F.L.I.	14.30	100.10
			Total	1,119.09	7,833.63

Direct Deposit Information

Routing Number	Account Number	Amount
#####0021	#####0569	2,429.24

Federal Tax Withholding Elections

Filing Status: Single or Married filing separately

Two Jobs: No

Claim Dependents: \$ 0.00

Deductions: \$ 0.00

Extra Withholding: \$ 0.00

Exempt: No

Paid Time Off/Vacation and/or Sick Information

Plan - Level	Available	Used	Balance
--------------	-----------	------	---------

Your worksite employer provides the Paid Time Off/Vacation and/or Sick Information shown. "Balance" reflects hours available for use under the PTO, vacation, and/or sick time provided to Insperty by your worksite employer. See your supervisor with questions about your Balance. If your Paid Time Off/Vacation and/or Sick Information does not appear, this information will be provided by your worksite employer, as applicable.

Insperty YTD Taxable Amount

Description	Amount
Federal	26,448.31
Social Security	26,448.31
Medicare	26,448.31

Insperty PEO Services, L.P.	19001 Crescent Springs Drive, Kingwood, TX 77339-3802	866-715-3552
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Just log in to portal.insperity.com for easy and instant access to this important information and much more!

Employee: CHANGANI, MOHIT		Employee ID: 4476529	Check #: 83488598
Company: GIGAPOWER, LLC (5646500)			
311 S AKARD ST FL 21		Pay Date: 07/31/2024	Pay Type: Salary
DALLAS, TX 75202		Pay Period: 07/16/2024 To 07/31/2024	Department: 5000
Phone: (469) 563 5667		Pay Frequency: SemiMonthly	Location: 0
Gross Earnings: 3,833.33	Total Taxes: 1,119.09	Total Deductions: 285.00	Net Pay: 2,429.24

Earnings		Start Date	End Date	Hrs/Units	Rate	Current	YTD
Description		Current Pay Period					
Salary - Exempt		07/16/2024	07/31/2024		3,833.33	3,833.33	30,666.64
Gross						3,833.33	30,666.64

Deductions & Credits			Taxes		
Description	Current	YTD	Description	Current	YTD
Pre-Tax			Federal Taxes	491.27	3,930.16
Employee Med	50.00	400.00	NY SIT	184.53	1,476.24
Employee D/V	5.00	40.00	NY SDI	1.30	10.40
Total	55.00	440.00	New York NY City Tax	138.64	1,109.12
			SocSec	234.26	1,874.08
After Tax			Medicare	54.79	438.32
401K Roth	230.00	1,840.00	NY F.L.I.	14.30	114.40
Total	230.00	1,840.00	Total	1,119.09	8,952.72

Direct Deposit Information			Federal Tax Withholding Elections	
Routing Number	Account Number	Amount	Filing Status: Single or Married filing separately	
#####0021	#####0569	2,429.24	Two Jobs: No	

Paid Time Off/Vacation and/or Sick Information				Claim Dependents: \$ 0.00	
Plan - Level	Available	Used	Balance	Deductions: \$ 0.00	
Your worksite employer provides the Paid Time Off/Vacation and/or Sick Information shown. "Balance" reflects hours available for use under the PTO, vacation, and/or sick time provided to Insperity by your worksite employer. See your supervisor with questions about your Balance. If your Paid Time Off/Vacation and/or Sick Information does not appear, this information will be provided by your worksite employer, as applicable.				Extra Withholding: \$ 0.00	
				Exempt: No	

Insperity YTD Taxable Amount	
Description	Amount
Federal	30,226.64
Social Security	30,226.64
Medicare	30,226.64

Insperity PEO Services, L.P.	19001 Crescent Springs Drive, Kingwood, TX 77339-3802	866-715-3552
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Employee: CHANGANI, MOHIT		Employee ID: 4476529	Check #: 83140546
Company: GIGAPOWER, LLC (5646500)			
311 S AKARD ST FL 21		Pay Date: 07/15/2024	Pay Type: Salary
DALLAS, TX 75202		PayPeriod: 07/01/2024 To 07/15/2024	Department: 5000
Phone: (469) 563 5667		Pay Frequency: SemiMonthly	Location: 0
Gross Earnings: 3,833.33		Total Taxes: 1,119.09	Total Deductions: 285.00
			Net Pay: 2,429.24

Earnings						
Description	Start Date	End Date	Hrs/Units	Rate	Current	YTD
Current Pay Period						
Salary - Exempt	07/01/2024	07/15/2024		3,833.33	3,833.33	26,833.31
Gross					3,833.33	26,833.31

Deductions & Credits			Taxes		
Description	Current	YTD	Description	Current	YTD
Pre-Tax			Federal Taxes	491.27	3,438.89
Employee Med	50.00	350.00	NY SIT	184.53	1,291.71
Employee D/V	5.00	35.00	NY SDI	1.30	9.10
Total	55.00	385.00	New York NY City Tax	138.64	970.48
			SocSec	234.26	1,639.82
After Tax			Medicare	54.79	383.53
401K Roth	230.00	1,610.00	NY F.L.I.	14.30	100.10
Total	230.00	1,610.00	Total	1,119.09	7,833.63

Direct Deposit Information			Federal Tax Withholding Elections	
Routing Number	Account Number	Amount	Filing Status: Single or Married filing separately	
#####0021	#####0569	2,429.24	Two Jobs: No	
Paid Time Off/Vacation and/or Sick Information			Claim Dependents: \$ 0.00	
Plan - Level	Available	Used	Balance	Deductions: \$ 0.00
Your worksite employer provides the Paid Time Off/Vacation and/or Sick Information shown. "Balance" reflects hours available for use under the PTO, vacation, and/or sick time provided to Insperity by your worksite employer. See your supervisor with questions about your Balance. If your Paid Time Off/Vacation and/or Sick Information does not appear, this information will be provided by your worksite employer, as applicable.			Extra Withholding: \$ 0.00	
			Exempt: No	
			Insperity YTD Taxable Amount	
			Description	Amount
			Federal	26,448.31
			Social Security	26,448.31
			Medicare	26,448.31

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Employee: CHANGANI, MOHIT		Employee ID: 4476529	Check #: 83860586
Company: GIGAPOWER, LLC (5646500)			
311 S AKARD ST FL 21		Pay Date: 08/15/2024	Pay Type: Salary
DALLAS, TX 75202		PayPeriod: 08/01/2024 To 08/15/2024	Department: 5000
Phone: (469) 563 5667		Pay Frequency: SemiMonthly	Location: 0
Gross Earnings: 3,833.33	Total Taxes: 1,119.09	Total Deductions: 285.00	Net Pay: 2,429.24

Earnings						
Description	Start Date	End Date	Hrs/Units	Rate	Current	YTD
Current Pay Period						
Salary - Exempt	08/01/2024	08/15/2024		3,833.33	3,833.33	34,499.97
Gross					3,833.33	34,499.97

Deductions & Credits			Taxes		
Description	Current	YTD	Description	Current	YTD
Pre-Tax			Federal Taxes	491.27	4,421.43
Employee Med	50.00	450.00	NY SIT	184.53	1,660.77
Employee D/V	5.00	45.00	NY SDI	1.30	11.70
Total	55.00	495.00	New York NY City Tax	138.64	1,247.76
			SocSec	234.26	2,108.34
After Tax			Medicare	54.79	493.11
401K Roth	230.00	2,070.00	NY F.L.I.	14.30	128.70
Total	230.00	2,070.00	Total	1,119.09	10,071.81

Direct Deposit Information			Federal Tax Withholding Elections	
Routing Number	Account Number	Amount	Filing Status: Single or Married filing separately	
#####0021	#####0569	2,429.24	Two Jobs: No	
			Claim Dependents: \$ 0.00	
			Deductions: \$ 0.00	
			Extra Withholding: \$ 0.00	
			Exempt: No	

Paid Time Off/Vacation and/or Sick Information				Insperity YTD Taxable Amount	
Plan - Level	Available	Used	Balance	Description	Amount
Your worksite employer provides the Paid Time Off/Vacation and/or Sick Information shown. "Balance" reflects hours available for use under the PTO, vacation, and/or sick time provided to Insperity by your worksite employer. See your supervisor with questions about your Balance. If your Paid Time Off/Vacation and/or Sick Information does not appear, this information will be provided by your worksite employer, as applicable.				Federal	34,004.97
				Social Security	34,004.97
				Medicare	34,004.97

Arizona

DRIVER LICENSE

USA



9 CLASS D
9a END NONE
12 REST NONE

4d DLN D11168593
3 DOB 01/11/1969

1 BHATIA
2 RAJESH
8 3452 S STUART AVE
GILBERT, AZ 85297-7847



4b EXP 09/19/2027 4a ISS 09/19/2019

15 SEX M 18 EYES BRO
16 HGT 6'-00" 19 HAIR BLK
17 WGT 185 lb

DONOR 

01/11/69

5 DD 6102C9897B0938R9

8879

Form
(Rev. January 2021)
Department of the Treasury
Internal Revenue Service

IRS e-file Signature Authorization

OMB No. 1545-0074

▶ ERO must obtain and retain completed Form 8879.
▶ Go to www.irs.gov/Form8879 for the latest information.

Submission Identification Number (SID) ▶

CLIENT COPY

Taxpayer's name

RAJESH K. BHATIA

Social security number

341 76 9127

Spouse's name

SHEELA SATPUTE

Spouse's social security number

527 91 5046

Part I Tax Return Information - Tax Year Ending December 31, 2023 (Enter year you are authorizing.)

Enter whole dollars only on lines 1 through 5.

Note: Form 1040-SS filers use line 4 only. Leave lines 1, 2, 3, and 5 blank.

1	Adjusted gross income	1	546,646.
2	Total tax	2	121,585.
3	Federal income tax withheld from Form(s) W-2 and Form(s) 1099	3	103,208.
4	Amount you want refunded to you	4	
5	Amount you owe	5	18,696.

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of the income tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from the income tax return (original or amended) I am now authorizing. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for the income tax return (original or amended) I am now authorizing and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

☒ I authorize ACT FINANCIAL AND TAX SERVICES, LLC to enter or generate my PIN 3 9 1 2 7 as my ERO firm name signature on the income tax return (original or amended) I am now authorizing. Enter five digits, but don't enter all zeros

☐ I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ▶ Date ▶ 03/21/2024

Spouse's PIN: check one box only

☒ I authorize ACT FINANCIAL AND TAX SERVICES, LLC to enter or generate my PIN 4 5 0 4 6 as my ERO firm name signature on the income tax return (original or amended) I am now authorizing. Enter five digits, but don't enter all zeros

☐ I will enter my PIN as my signature on the income tax return (original or amended) I am now authorizing. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ▶ Date ▶ 03/21/2024

Practitioner PIN Method Returns Only - continue below

Part III Certification and Authentication - Practitioner PIN Method Only

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN.

0 6 1 6 0 9 1 4 8 5 4

Don't enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the electronic individual income tax return (original or amended) I am now authorized to file for tax year indicated above for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and Pub. 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

ERO's signature ▶ Date ▶ 03/21/2024

319995 04-01-23

ERO Must Retain This Form - See Instructions
Don't Submit This Form to the IRS Unless Requested To Do So

LHA For Paperwork Reduction Act Notice, see your tax return instructions.

Form 8879 (Rev. 01-2021)

1

11370321 137403 BHATIA

2023.03010 BHATIA, RAJESH

BHATIA1

J.S. Individual Income Tax Return

2023

OMB No. 1545-0074

IRS Use Only - Do not write or staple in this space.

1 - Dec. 31, 2023, or other tax year beginning		, ending		See separate instructions.	
Last name		Last name		Your social security number	
BHATIA		BHATIA		341 76 9127	
Spouse's first name and middle initial		Last name		Spouse's social security number	
SATPUTE		SATPUTE		527 91 5046	
(number and street). If you have a P.O. box, see instructions.				Apt. no.	
STUART AVE					
post office. If you have a foreign address, also complete spaces below.				State ZIP code	
				AZ 85297	
Country name		Foreign province/state/county		Foreign postal code	

☐ Single ☐ Head of household (HOH)

☒ Married filing jointly (even if only one had income)

☐ Married filing separately (MFS) ☐ Qualifying surviving spouse (QSS)

If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent.

At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) ☐ Yes ☒ No

Someone can claim: ☐ You as a dependent ☐ Your spouse as a dependent

☐ Spouse itemizes on a separate return or you were a dual-status alien

Dependents (see instructions):		(2) Social security number	(3) Relationship to you	(4) Check the box if qualifies for (see instr.):	
(1) First name	Last name			Child tax credit	Credit for other dependents
AYAN BHATIA		617-59-9356	SON	☐	☒
ESHA BHATIA		615-71-8697	DAUGHTER	☒	☐

ome		1a Total amount from Form(s) W-2, box 1 (see instructions) STMT 1		1a 353,681.	
ach Form(s)		b Household employee wages not reported on Form(s) W-2		1b	
2 here. Also		c Tip income not reported on line 1a (see instructions)		1c	
ach Forms		d Medicaid waiver payments not reported on Form(s) W-2 (see instructions)		1d	
2G and		e Taxable dependent care benefits from Form 2441, line 26		1e	
99-R if tax		f Employer-provided adoption benefits from Form 8839, line 29		1f	
as withheld.		g Wages from Form 8919, line 6		1g	
you did not		h Other earned income (see instructions)		1h	
et a Form		i Nontaxable combat pay election (see instructions)		1i	
V-2, see		z Add lines 1a through 1h		1z 353,681.	
nstructions.		2a Tax-exempt interest		2a	
Attach		3a Qualified dividends		3a 30,325.	
Sch. B if		4a IRA distributions		4a	
required.		5a Pensions and annuities		5a 119,923.	
Standard		6a Social security benefits		6a	
Deduction for -		c If you elect to use the lump-sum election method, check here (see instructions)			
• Single or Married		7 Capital gain or (loss). Attach Schedule D if required. If not required, check here		7 8,832.	
filing separately,		8 Additional income from Schedule 1, line 10		8 141,090.	
\$13,850		9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income		9 546,646.	
• Married filing		10 Adjustments to income from Schedule 1, line 26		10	
jointly or		11 Subtract line 10 from line 9. This is your adjusted gross income		11 546,646.	
Qualifying		12 Standard deduction or itemized deductions (from Schedule A)		12 27,700.	
surviving spouse,		13 Qualified business income deduction from Form 8995 or Form 8995-A		13	
\$27,700		14 Add lines 12 and 13		14 27,700.	
• Head of		15 Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income		15 518,946.	
household,					
\$20,800					
• If you checked					
any box under					
Standard					
Deduction,					
see instructions.					

LHA For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions.

Form 1040 (2023)

313921 12-04-23

JESH K. BHATIA & SHEELA SATPUTE

341-76-9127

STMT 4 Page 2

16	Tax (see instructions). Check if any from Form(s): 1 ☐ 8814 2 ☐ 4972 3 ☐	117,589.
17	Amount from Schedule 2, line 3	
18	Add lines 16 and 17	117,589.
19	Child tax credit or credit for other dependents from Schedule 8812	
20	Amount from Schedule 3, line 8	486.
21	Add lines 19 and 20	486.
22	Subtract line 21 from line 18. If zero or less, enter -0-	117,103.
23	Other taxes, including self-employment tax, from Schedule 2, line 21	4,482.
24	Add lines 22 and 23. This is your total tax	121,585.
25	Federal income tax withheld from:	
a	Form(s) W-2 SEE STATEMENT 5	25a 100,553.
b	Form(s) 1099	25b
c	Other forms (see instructions) SEE STATEMENT 6	25c 2,655.
d	Add lines 25a through 25c	25d 103,208.
26	2023 estimated tax payments and amount applied from 2022 return	26
27	Earned income credit (EIC)	27
28	Additional child tax credit from Schedule 8812	28
29	American opportunity credit from Form 8863, line 8	29
30	Reserved for future use	30
31	Amount from Schedule 3, line 15	31
32	Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits	32
33	Add lines 25d, 26, and 32. These are your total payments	33 103,208.
34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34
35a	Amount of line 34 you want refunded to you. If Form 8888 is attached, check here ☐	35a
b	Routing number	c Type: ☐ Checking ☐ Savings
d	Account number	
36	Amount of line 34 you want applied to your 2024 estimated tax	36
37	Subtract line 33 from line 24. This is the amount you owe. For details on how to pay, go to www.irs.gov/Payments or see instructions	37 18,696.
38	Estimated tax penalty (see instructions)	38 319.

Third Party
esignee

Do you want to allow another person to discuss this return with the IRS? See instructions

☒ Yes. Complete below.☐ No

Designee's name CRISTINA ANDREANA CPA Phone no. 203-327-5010 Personal identification number (PIN) 14854

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature

Date

Your occupation

If the IRS sent you an Identity Protection PIN, enter it here (see inst.)

Spouse's signature. If a joint return, both must sign.

Date

Spouse's occupation

If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)

Sign
HereJoint return?
See instructions.
Keep a copy for
your records.

Phone no.

Email address BHATIA RAJESH@YAHOO.COM

Paid
Preparer
Use Only

Preparer's name

CRISTINA ANDREANA
CPA

Preparer's signature

CRISTINA ANDREANA
CPA

Date

03/21/24

PTIN

P01314974

Check if:

☒ Self-employed

Phone no.

203-327-5010

Firm's
nameACT FINANCIAL AND TAX SERVICES, LLC
1200 SUMMER STREET, SUITE 107

Firm's EIN

05-0595086

Firm's
address

STAMFORD, CT 06905

Form 1040 (2023)

Go to www.irs.gov/Form1040 for instructions and the latest information.

2023 W-2 and EARNINGS SUMMARY

Employee Reference Copy

W-2 Wage and Tax Statement

2023

Copy C for employee's records. OMB No. 1545-0008

d Control number	Dept.	Corp.	Employer use only
0000128976 WVQ	US-CT-	WY46	A 28972

c Employer's name, address, and ZIP code

ORACLE AMERICA INC
500 ORACLE PARKWAY
REDWOOD SHORES, CA 94065

RETURN POSTAGE GUARANTEED

e/f Employee's name, address, and ZIP code

RAJESH K BHATIA
3452 SOUTH STUART AVE
GILBERT, AZ 85297

b Employer's FED ID number	a Employee's SSA number
94-2805249	XXX-XX-9127

1 Wages, tips, other comp.	2 Federal income tax withheld
141090.21	31039.85

3 Social security wages	4 Social security tax withheld

5 Medicare wages and tips	6 Medicare tax withheld

7 Social security tips	8 Allocated tips

9

11 Nonqualified plans	12a See instructions for box 12
141090.21	

14 Other	12b	
	12c	
	12d	
	13 Stat emp	Ret. plan 3rd party sick pay

15 State	Employer's state ID no.	16 State wages, tips, etc.
CT	4986451-000	141090.21

17 State income tax	18 Local wages, tips, etc.
9853.87	

19 Local income tax	20 Locality name

This summary section is included with your W-2 to help describe this portion in more detail. The reverse side includes general information that you may also find helpful. The following reflects your final pay stub, plus any adjustments made by your employer.

GROSS PAY	141,090.21	SOCIAL SECURITY TAX WITHHELD BOX 04 OF W-2	0.00
FED. INCOME TAX WITHHELD BOX 02 OF W-2	31,039.85	MEDICARE TAX WITHHELD BOX 06 OF W-2	0.00
STATE INCOME TAX BOX 17 OF W-2	9,853.87	SUI/SDI BOX 14 OF W-2	0.00
LOCAL INCOME TAX BOX 19 OF W-2	0.00		

To change your employee W-4 profile information file a new W-4 with your payroll department

RAJESH K BHATIA
3452 SOUTH STUART AVE
GILBERT, AZ 85297

Social Security Number: XXX-XX-9127

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PAGE 01 OF 01

1 Wages, tips, other comp.	2 Federal income tax withheld
141090.21	31039.85

3 Social security wages	4 Social security tax withheld

5 Medicare wages and tips	6 Medicare tax withheld

d Control number	Dept.	Corp.	Employer use only
0000128976 WVQ	US-CT-	WY46	A 28972

c Employer's name, address, and ZIP code

ORACLE AMERICA INC
500 ORACLE PARKWAY
REDWOOD SHORES, CA 94065

RETURN POSTAGE GUARANTEED

b Employer's FED ID number	a Employee's SSA number
94-2805249	XXX-XX-9127

7 Social security tips	8 Allocated tips

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11 Nonqualified plans	12a See instructions for box 12
141090.21	

14 Other	12b	
	12c	
	12d	
	13 Stat emp	Ret. plan 3rd party sick pay

e/f Employee's name, address and ZIP code

RAJESH K BHATIA
3452 SOUTH STUART AVE
GILBERT, AZ 85297

15 State	Employer's state ID no.	16 State wages, tips, etc.
CT	4986451-000	141090.21

17 State income tax	18 Local wages, tips, etc.
9853.87	

19 Local income tax	20 Locality name

Federal Filing Copy

W-2 Wage and Tax Statement

2023

Copy B to be filed with employee's Federal Income Tax Return. OMB No. 1545-0008

1 Wages, tips, other comp.	2 Federal income tax withheld
141090.21	31039.85

3 Social security wages	4 Social security tax withheld

5 Medicare wages and tips	6 Medicare tax withheld

d Control number	Dept.	Corp.	Employer use only
0000128976 WVQ	US-CT-	WY46	A 28972

c Employer's name, address, and ZIP code

ORACLE AMERICA INC
500 ORACLE PARKWAY
REDWOOD SHORES, CA 94065

RETURN POSTAGE GUARANTEED

b Employer's FED ID number	a Employee's SSA number
94-2805249	XXX-XX-9127

7 Social security tips	8 Allocated tips

9

11 Nonqualified plans	12a
141090.21	

14 Other	12b	
	12c	
	12d	
	13 Stat emp	Ret. plan 3rd party sick pay

e/f Employee's name, address and ZIP code

RAJESH K BHATIA
3452 SOUTH STUART AVE
GILBERT, AZ 85297

15 State	Employer's state ID no.	16 State wages, tips, etc.
CT	4986451-000	141090.21

17 State income tax	18 Local wages, tips, etc.
9853.87	

19 Local income tax	20 Locality name

CT. State Filing Copy

W-2 Wage and Tax Statement

2023

Copy 2 to be filed with employee's State Income Tax Return. OMB No. 1545-0008

1 Wages, tips, other comp.	2 Federal income tax withheld
141090.21	31039.85

3 Social security wages	4 Social security tax withheld

5 Medicare wages and tips	6 Medicare tax withheld

d Control number	Dept.	Corp.	Employer use only
0000128976 WVQ	US-CT-	WY46	A 28972

c Employer's name, address, and ZIP code

ORACLE AMERICA INC
500 ORACLE PARKWAY
REDWOOD SHORES, CA 94065

RETURN POSTAGE GUARANTEED

b Employer's FED ID number	a Employee's SSA number
94-2805249	XXX-XX-9127

7 Social security tips	8 Allocated tips

9

11 Nonqualified plans	12a
141090.21	

14 Other	12b	
	12c	
	12d	
	13 Stat emp	Ret. plan 3rd party sick pay

e/f Employee's name, address and ZIP code

RAJESH K BHATIA
3452 SOUTH STUART AVE
GILBERT, AZ 85297

15 State	Employer's state ID no.	16 State wages, tips, etc.
CT	4986451-000	141090.21

17 State income tax	18 Local wages, tips, etc.
9853.87	

19 Local income tax	20 Locality name

City or Local Filing Copy

W-2 Wage and Tax Statement

2023

Copy 2 to be filed with employee's City or Local Income Tax Return. OMB No. 1545-0008

Instructions for Employee

Box 1. Enter this amount on the wages line of your tax return.

Box 2. Enter this amount on the federal income tax withheld line of your tax return.

Box 5. You may be required to report this amount on Form 8959. See the Form 1040 instructions to determine if you are required to complete Form 8959.

Box 6. This amount includes the 1.45% Medicare tax withheld on all Medicare wages and tips shown in box 5, as well as the 0.9% Additional Medicare Tax on any of those Medicare wages and tips above \$200,000.

Box 8. This amount is **not** included in box 1, 3, 5, or 7. For information on how to report tips on your tax return, see the Form 1040 instructions.

You must file Form 4137 with your income tax return to report at least the allocated tip amount unless you can prove with adequate records that you received a smaller amount. If you have records that show the actual amount of tips you received, report that amount even if it is more or less than the allocated tips. Use Form 4137 to figure the social security and Medicare tax owed on tips you didn't report to your employer. Enter this amount on the wages line of your tax return. By filing Form 4137, your social security tips will be credited to your social security record (used to figure your benefits).

Box 10. This amount includes the total dependent care benefits that your employer paid to you or incurred on your behalf (including amounts from a section 125 (cafeteria) plan). Any amount over your employer's plan limit is also included in box 1. See Form 2441.

Box 11. This amount is (a) reported in box 1 if it is a distribution made to you from a nonqualified deferred compensation or nongovernmental section 457(b) plan, or (b) included in box 3 and/or box 5 if it is a prior year deferral under a nonqualified or section 457(b) plan that became taxable for social security and Medicare taxes this year because there is no longer a substantial risk of forfeiture of your right to the deferred amount. This box shouldn't be used if you had a deferral and a distribution in the same calendar year. If you made a deferral and received a distribution in the same calendar year, and you are or will be age 62 by the end of the calendar year, your employer should file Form SSA-131, Employer Report of Special Wage Payments, with the Social Security Administration and give you a copy.

Box 12. The following list explains the codes shown in box 12. You may need this information to complete your tax return. Elective deferrals (codes D, E, F, and S) and designated Roth contributions (codes AA, BB, and EE) under all plans are generally limited to a total of \$22,500 (\$15,500 if you only have SIMPLE plans; \$25,500 for section 403(b) plans if you qualify for the 15-year rule explained in Pub. 571). Deferrals under code G are limited to \$22,500. Deferrals under code H are limited to \$7,000.

However, if you were at least age 50 in 2023, your employer may have allowed an additional deferral of up to \$7,500 (\$3,500 for section 401(k) (11) and 408(p) SIMPLE plans). This additional deferral amount is not subject to the overall limit on elective deferrals. For code G, the limit on elective deferrals may be higher for the last 3 years before you reach retirement age. Contact your plan administrator for more information. Amounts in excess of the overall elective deferral limit must be included in income. See the Form 1040 instructions.

Note: If a year follows code D through H, S, Y, AA, BB, or EE, you made a make-up pension contribution for a prior year(s) when you were in military service. To figure whether you made excess deferrals, consider these amounts for the year shown, not the current year. If no year is shown, the contributions are for the current year.

- A**—Uncollected social security or RRTA tax on tips. Include this tax on Form 1040 or 1040-SR. See the Form 1040 instructions.
- B**—Uncollected Medicare tax on tips. Include this tax on Form 1040 or 1040-SR. See the Form 1040 instructions.
- C**—Taxable cost of group-term life insurance over \$50,000 (included in boxes 1, 3 (up to the social security wage base), and 5)
- D**—Elective deferrals to a section 401(k) cash or deferred arrangement. Also includes deferrals under a SIMPLE retirement account that is part of a section 401(k) arrangement.
- E**—Elective deferrals under a section 403(b) salary reduction agreement
- F**—Elective deferrals under a section 408(k)(6) salary reduction SEP
- G**—Elective deferrals and employer contributions (including nonelective deferrals) to a section 457(b) deferred compensation plan
- H**—Elective deferrals to a section 501(c)(18)(D) tax-exempt organization plan. See the Form 1040 instructions for how to deduct.
- J**—Nontaxable sick pay (information only, not included in box 1, 3, or 5)
- K**—20% excise tax on excess golden parachute payments. See the Form 1040 instructions.
- L**—Substantiated employee business expense reimbursements (nontaxable)
- M**—Uncollected social security or RRTA tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See the Form 1040 instructions.
- N**—Uncollected Medicare tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See the Form 1040 instructions.
- P**—Excludable moving expense reimbursements paid directly to a member of the U.S. Armed Forces (not included in box 1, 3, or 5)
- Q**—Nontaxable combat pay. See the Form 1040 instructions for details on reporting this amount.
- R**—Employer contributions to your Archer MSA. Report on Form 8853.

- S**—Employee salary reduction contributions under a section 408(p) SIMPLE plan (not included in box 1)
- T**—Adoption benefits (not included in box 1). Complete Form 8839 to figure any taxable and nontaxable amounts.
- V**—Income from exercise of nonstatutory stock option(s) (included in boxes 1, 3 (up to the social security wage base), and 5). See Pub. 525 for reporting requirements.
- W**—Employer contributions (including amounts the employee elected to contribute using a section 125 (cafeteria) plan) to your health savings account. Report on Form 8889.
- Y**—Deferrals under a section 409A nonqualified deferred compensation plan
- Z**—Income under a nonqualified deferred compensation plan that fails to satisfy section 409A. This amount is also included in box 1. It is subject to an additional 20% tax plus interest. See the Form 1040 instructions.
- AA**—Designated Roth contributions under a section 401(k) plan
- BB**—Designated Roth contributions under a section 403(b) plan
- DD**—Cost of employer-sponsored health coverage. **The amount reported with code DD is not taxable.**
- EE**—Designated Roth contributions under a governmental section 457(b) plan. This amount does not apply to contributions under a tax-exempt organization section 457(b) plan.
- FF**—Permitted benefits under a qualified small employer health reimbursement arrangement
- GG**—Income from qualified equity grants under section 83(i)
- HH**—Aggregate deferrals under section 83(i) elections as of the close of the calendar year

Box 13. If the "Retirement plan" box is checked, special limits may apply to the amount of traditional IRA contributions you may deduct. See Pub. 590-A.

Box 14. Employers may use this box to report information such as state disability insurance taxes withheld, union dues, uniform payments, health insurance premiums deducted, nontaxable income, educational assistance payments, or a member of the clergy's parsonage allowance and utilities. Railroad employers use this box to report railroad retirement (RRTA) compensation, Tier 1 tax, Tier 2 tax, Medicare tax, and Additional Medicare Tax. Include tips reported by the employee to the employer in railroad retirement (RRTA) compensation.

Note: Keep **Copy C** of Form W-2 for at least 3 years after the due date for filing your income tax return. However, to help **protect your social security benefits**, keep Copy C until you begin receiving social security benefits, just in case there is a question about your work record and/or earnings in a particular year.

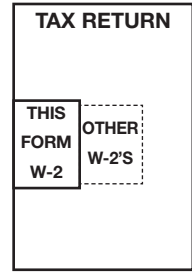
Department of the Treasury - Internal Revenue Service

NOTE: THESE ARE SUBSTITUTE WAGE AND TAX STATEMENTS AND ARE ACCEPTABLE FOR FILING WITH YOUR FEDERAL, STATE AND LOCAL/CITY INCOME TAX RETURNS.

This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.

IMPORTANT NOTE:

In order to insure efficient processing, attach this W-2 to your tax return like this (following agency instructions):



Notice to Employee

Do you have to file? Refer to the Form 1040 instructions to determine if you are required to file a tax return. Even if you don't have to file a tax return, you may be eligible for a refund if box 2 shows an amount or if you are eligible for any credit.

Earned income credit (EIC). You may be able to take the EIC for 2023 if your adjusted gross income (AGI) is less than a certain amount. The amount of the credit is based on income and family size. Workers without children could qualify for a smaller credit. You and any qualifying children must have valid social security numbers (SSNs). You can't take the EIC if your investment income is more than the specified amount for 2023 or if income is earned for services provided while you were an inmate at a penal institution. For 2023 income limits and more information, visit www.irs.gov/EITC. See also Pub. 596. **Any EIC that is more than your tax liability is refunded to you, but only if you file a tax return.**

Employee's social security number (SSN). For your protection, this form may show only the last four digits of your SSN. However, your employer has reported your complete SSN to the IRS and the Social Security Administration (SSA).

Clergy and religious workers. If you aren't subject to social security and Medicare taxes, see Pub. 517.

Corrections. If your name, SSN, or address is incorrect, correct Copies B, C, and 2 and ask your employer to correct your employment record. Be sure to ask the employer to file Form W-2c, Corrected Wage and Tax Statement, with the SSA to correct any name, SSN, or money amount error reported to the SSA on Form W-2. Be sure to get your copies of Form W-2c from your employer for all corrections made so you may file them with your tax return. If your name and SSN are correct but aren't the same as shown on your social security card, you should ask for a new card that displays your correct name at any SSA office or by calling 800-772-1213. You may also visit the SSA website at www.SSA.gov.

Cost of employer-sponsored health coverage (if such cost is provided by the employer). The reporting in box 12, using code DD, of the cost of employer-sponsored health coverage is for your information only. **The amount reported with code DD is not taxable.**

Credit for excess taxes. If you had more than one employer in 2023 and more than \$9,932.40 in social security and/or Tier 1 railroad retirement (RRTA) taxes were withheld, you may be able to claim a credit for the excess against your federal income tax. See the Form 1040 instructions. If you had more than one railroad employer and more than \$5,821.20 in Tier 2 RRTA tax was withheld, you may be able to claim a refund on Form 843. See the Instructions for Form 843.

Copy B—To Be Filed With Employee's FEDERAL Tax Return.			OMB No. 1545-0008		
a Employee's soc. sec. no. 341-76-9127		1 Wages, tips, other comp. 324475.81		2 Federal income tax withheld 68950.74	
b Employer ID number (EIN) 86-2420549		3 Social security wages 160200.00		4 Social security tax withheld 9932.40	
		5 Medicare wages and tips 494975.93		6 Medicare tax withheld 9831.93	
c Employer's name, address, and ZIP code Endpoint Technologies, LLC 2101 E. El Segundo Boulevard, Ste 104 El Segundo, CA 90245					
d Control number					
e Employee's name, address, and ZIP code Rajesh Bhatia 3452 S Stuart Ave Gilbert, AZ 85297					
7 Social security tips		8 Allocated tips		9	
10 Dependent care benefits		11 Nonqualified plans		12a Code See inst. for box 12 C 138.00	
13 Statutory employee		14 Other		12b Code D 30000.00	
Retirement plan X				12c Code W 7200.00	
Third-party sick pay				12d Code DD 27349.56	
AZ 86-2420549		324475.81		6486.80	
15 State Employer's state ID number		16 State wages, tips, etc.		17 State income tax	
18 Local wages, tips, etc.		19 Local income tax		20 Locality name	

Form W-2 Wage and Tax Statement 2023 Dept. of the Treasury - IRS
This information is being furnished to the Internal Revenue Service.

Copy 2—To Be Filed With Employee's State, City, or Local Income Tax Return			OMB No. 1545-0008		
a Employee's soc. sec. no. 341-76-9127		1 Wages, tips, other comp. 324475.81		2 Federal income tax withheld 68950.74	
b Employer ID number (EIN) 86-2420549		3 Social security wages 160200.00		4 Social security tax withheld 9932.40	
		5 Medicare wages and tips 494975.93		6 Medicare tax withheld 9831.93	
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10 Dependent care benefits		11 Nonqualified plans		12a Code C 138.00	
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Retirement plan X				12c Code W 7200.00	
Third-party sick pay				12d Code DD 27349.56	
AZ 86-2420549		324475.81		6486.80	
15 State Employer's state ID number		16 State wages, tips, etc.		17 State income tax	
18 Local wages, tips, etc.		19 Local income tax		20 Locality name	

Form W-2 Wage and Tax Statement 2023 Dept. of the Treasury - IRS

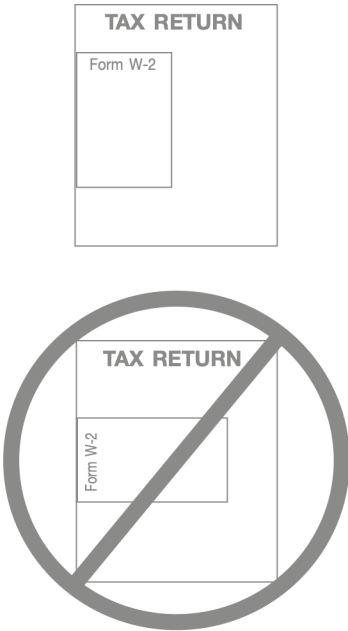
Copy C—For EMPLOYEE'S RECORDS (See Notice to Employee on the back of Copy B.)			OMB No. 1545-0008		
a Employee's soc. sec. no. 341-76-9127		1 Wages, tips, other comp. 324475.81		2 Federal income tax withheld 68950.74	
b Employer ID number (EIN) 86-2420549		3 Social security wages 160200.00		4 Social security tax withheld 9932.40	
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AZ 86-2420549		324475.81		6486.80	
15 State Employer's state ID number		16 State wages, tips, etc.		17 State income tax	
18 Local wages, tips, etc.		19 Local income tax		20 Locality name	

Form W-2 Wage and Tax Statement 2023 Dept. of the Treasury - IRS
This information is being furnished to the IRS. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.

Copy 2—To Be Filed With Employee's State, City, or Local Income Tax Return			OMB No. 1545-0008		
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18 Local wages, tips, etc.		19 Local income tax		20 Locality name	

Form W-2 Wage and Tax Statement 2023 Dept. of the Treasury - IRS
BW24UP NTF 2585808 **3 BW24UP**

In order for the information on this form to be effectively keypunched, it must be read upright. Therefore, attach this W-2 to your state, city, or local tax return as follows:



NOTE: THIS W-2 IS ACCEPTABLE FOR FILING WITH YOUR FEDERAL, STATE, AND LOCAL/CITY INCOME TAX RETURNS.

Notice to Employee

Do you have to file? Refer to the Form 1040 instructions to determine if you are required to file a tax return. Even if you don't have to file a tax return, you may be eligible for a refund if box 2 shows an amount or if you are eligible for any credit.

Earned income credit (EIC). You may be able to take the EIC for 2023 if your adjusted gross income (AGI) is less than a certain amount. The amount of the credit is based on income and family size. Workers without children could qualify for a smaller credit. You and any qualifying children must have valid social security numbers (SSNs). You can't take the EIC if your investment income is more than the specified amount for 2023 or if income is earned for services provided while you were an inmate at a penal institution. For 2023 income limits and more information, visit www.irs.gov/EITC. See also Pub. 596. **Any EIC that is more than your tax liability is refunded to you, but only if you file a tax return.**

Employee's social security number (SSN). For your protection, this form may show only the last four digits of your SSN. However, your employer has reported your complete SSN to the IRS and the Social Security Administration (SSA).

Clergy and religious workers. If you aren't subject to social security and Medicare taxes, see Pub. 517. **Corrections.** If your name, SSN, or address is incorrect, correct Copies B, C, and 2 and ask your employer to correct your employment record. Be sure to ask the employer to file Form W-2c, Corrected Wage and Tax Statement, with the SSA to correct any name, SSN, or money amount error reported to the SSA on Form W-2. Be sure to get your copies of Form W-2c from your employer for all corrections made so you may file them with your tax return. If your name and SSN are correct but aren't the same as shown on your social security card, you should ask for a new card that displays your correct name at any

SSA office or by calling 800-772-1213. You may also visit the SSA website at www.SSA.gov.

Cost of employer-sponsored health coverage (if such cost is provided by the employer). The reporting in box 12, using code DD, of the cost of employer-sponsored health coverage is for your information only. **The amount reported with code DD is not taxable.**

Credit for excess taxes. If you had more than one employer in 2023 and more than \$9,932.40 in social security and/or Tier 1 railroad retirement (RRTA) taxes were withheld, you may be able to claim a credit for the excess against your federal income tax. See the Form 1040 instructions. If you had more than one railroad employer and more than \$5,821.20 in Tier 2 RRTA tax was withheld, you may be able to claim a refund on Form 843. See the Instructions for Form 843. (See also *Instructions for Employee*.)

Instructions for Employee
(See also *Notice to Employee*.)

Box 1. Enter this amount on the wages line of your tax return.

Box 2. Enter this amount on the federal income tax withheld line of your tax return.

Box 5. You may be required to report this amount on Form 8959. See the Form 1040 instructions to determine if you are required to complete Form 8959.

Box 6. This amount includes the 1.45% Medicare tax withheld on all Medicare wages and tips shown in box 5, as well as the 0.9% Additional Medicare Tax on any of those Medicare wages and tips above \$200,000.

Box 8. This amount is **not** included in box 1, 3, 5, or 7. For information on how to report tips on your tax return, see the Form 1040 instructions.

You must file Form 4137 with your income tax return to report at least the allocated tip amount unless you can prove with adequate records that you received a smaller amount. If you have records that show the actual

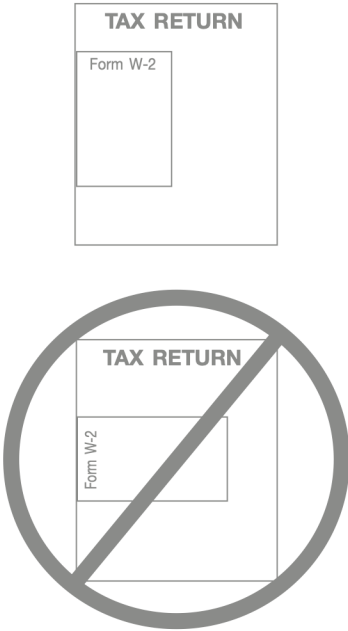
amount of tips you received, report that amount even if it is more or less than the allocated tips. Use Form 4137 to figure the social security and Medicare tax owed on tips you didn't report to your employer. Enter this amount on the wages line of your tax return. By filing Form 4137, your social security tips will be credited to your social security record (used to figure your benefits).

Box 10. This amount includes the total dependent care benefits that your employer paid to you or incurred on your behalf (including amounts from a section 125 (cafeteria) plan). Any amount over your employer's plan limit is also included in box 1. See Form 2441.

Box 11. This amount is (a) reported in box 1 if it is a distribution made to you from a nonqualified deferred compensation or nongovernmental section 457(b) plan, or (b) included in box 3 and/or box 5 if it is a prior year deferral under a nonqualified or section 457(b) plan that became taxable for social security and Medicare taxes this year because there is no longer a substantial risk of forfeiture of your right to the deferred amount. This box shouldn't be used if you had a deferral and a distribution in the same calendar year. If you made a deferral and received a distribution in the same calendar year, and you are or will be age 62 by the end of the calendar year, your employer should file Form SSA-131, Employer Report of Special Wage Payments, with the Social Security Administration and give you a copy.

Box 12. The following list explains the codes shown in box 12. You may need this information to complete your tax return. Elective deferrals (codes D, E, F, and S) and designated Roth contributions (codes AA, BB, and EE) under all plans are generally limited to a total of \$22,500 (\$15,500 if you only have SIMPLE plans; \$25,500 for section 403(b) plans if you qualify for the 15-year rule explained in Pub. 571). Deferrals under code G are limited to \$22,500. Deferrals under code H are limited to \$7,000.

In order for the information on this form to be effectively keypunched, it must be read upright. Therefore, attach this W-2 to your state, city, or local tax return as follows:



NOTE: THIS W-2 IS ACCEPTABLE FOR FILING WITH YOUR FEDERAL, STATE, AND LOCAL/CITY INCOME TAX RETURNS.

Instructions for Employee
(continued)

Box 12 (continued)

However, if you were at least age 50 in 2023, your employer may have allowed an additional deferral of up to \$7,500 (\$3,500 for section 401(k)(11) and 408(p) SIMPLE plans). This additional deferral amount is not subject to the overall limit on elective deferrals. For code G, the limit on elective deferrals may be higher for the last 3 years before you reach retirement age. Contact your plan administrator for more information. Amounts in excess of the overall elective deferral limit must be included in income. See the Form 1040 instructions.

Note: If a year follows code D through H, S, Y, AA, BB, or EE, you made a make-up pension contribution for a prior year(s) when you were in military service. To figure whether you made excess deferrals, consider these amounts for the year shown, not the current year. If no year is shown, the contributions are for the current year.

A—Uncollected social security or RRTA tax on tips. Include this tax on Form 1040 or 1040-SR. See the Form 1040 instructions.

B—Uncollected Medicare tax on tips. Include this tax on Form 1040 or 1040-SR. See the Form 1040 instructions.

C—Taxable cost of group-term life insurance over \$50,000 (included in boxes 1, 3 (up to the social security wage base), and 5).

D—Elective deferrals to a section 401(k) cash or deferred arrangement. Also includes deferrals under a SIMPLE retirement account that is part of a section 401(k) arrangement.

E—Elective deferrals under a section 403(b) salary reduction agreement.

F—Elective deferrals under a section 408(k)(6) salary reduction SEP.

G—Elective deferrals and employer contributions (including nonelective deferrals) to a section 457(b) deferred compensation plan.

H—Elective deferrals to a section 501(c)(18)(D) tax-exempt organization plan. See the Form 1040 instructions for how to deduct.

J—Nontaxable sick pay (information only, not included in box 1, 3, or 5).

K—20% excise tax on excess golden parachute payments. See the Form 1040 instructions.

L—Substantiated employee business expense reimbursements (nontaxable).

M—Uncollected social security or RRTA tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See the Form 1040 instructions.

N—Uncollected Medicare tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See the Form 1040 instructions.

P—Excludable moving expense reimbursements paid directly to a member of the U.S. Armed Forces (not included in box 1, 3, or 5).

Q—Nontaxable combat pay. See the Form 1040 instructions for details on reporting this amount.

R—Employer contributions to your Archer MSA. Report on Form 8853.

S—Employee salary reduction contributions under a section 408(p) SIMPLE plan (not included in box 1).

T—Adoption benefits (not included in box 1). Complete Form 8839 to figure any taxable and nontaxable amounts.

V—Income from exercise of nonstatutory stock option(s) (included in boxes 1, 3 (up to the social security wage base), and 5). See Pub. 525 for reporting requirements.

W—Employer contributions (including amounts the employee elected to contribute using a section 125 (cafeteria) plan) to your health savings account. Report on Form 8889.

Y—Deferrals under a section 409A nonqualified deferred compensation plan.

Z—Income under a nonqualified deferred compensation plan that fails to satisfy section 409A. This

amount is also included in box 1. It is subject to an additional 20% tax plus interest. See the Form 1040 instructions.

AA—Designated Roth contributions under a section 401(k) plan.

BB—Designated Roth contributions under a section 403(b) plan.

DD—Cost of employer-sponsored health coverage. **The amount reported with code DD is not taxable.**

EE—Designated Roth contributions under a governmental section 457(b) plan. This amount does not apply to contributions under a tax-exempt organization section 457(b) plan.

FF—Permitted benefits under a qualified small employer health reimbursement arrangement.

GG—Income from qualified equity grants under section 83(i).

HH—Aggregate deferrals under section 83(i) elections as of the close of the calendar year.

Box 13. If the "Retirement plan" box is checked, special limits may apply to the amount of traditional IRA contributions you may deduct. See Pub. 590-A.

Box 14. Employers may use this box to report information such as state disability insurance taxes withheld, union dues, uniform payments, health insurance premiums deducted, nontaxable income, educational assistance payments, or a member of the clergy's parsonage allowance and utilities. Railroad employers use this box to report railroad retirement (RRTA) compensation, Tier 1 tax, Tier 2 tax, Medicare tax, and Additional Medicare Tax. Include tips reported by the employee to the employer in railroad retirement (RRTA) compensation.

Note: Keep Copy C of Form W-2 for at least 3 years after the due date for filing your income tax return. However, to help protect your social security benefits, keep Copy C until you begin receiving social security benefits, just in case there is a question about your work record and/or earnings in a particular year.



First American

Endpoint Technologies, LLC 2101 E. El Segundo Boulevard, Ste 104 El Segundo, CA 90245 +1 866-908-6962
Rajesh Bhatia 3452 S Stuart Ave Gilbert, AZ 85297

Name	Company	Employee ID	Pay Period Begin	Pay Period End	Check Date	Check Number
Rajesh Bhatia	Endpoint Technologies, LLC	631383	07/28/2024	08/10/2024	08/16/2024	

	Hours Worked	Gross Pay	Pre Tax Deductions	Employee Taxes	Post Tax Deductions	Net Pay
Current	80.00	14,423.08	4,964.26	2,351.86	1,000.00	6,106.96
YTD	1,312.00	534,317.36	183,053.95	100,832.01	11,925.72	238,505.68

Earnings						Employee Taxes		
Description	Dates	Hours	Rate	Amount	YTD	Description	Amount	YTD
Bonus YE Previous			0		289,125.00	OASDI	0.00	10,453.20
GTL	07/28/2024 - 08/10/2024	0	0	10.75	172.00	Medicare	327.61	10,575.10
Holiday			0		8,653.86	Federal Withholding	1,835.07	72,778.40
Employer HSA Contribution			0		900.00	State Tax - AZ	189.18	7,025.31
Regular Pay	07/28/2024 - 08/10/2024	80	0	14,423.08	236,538.50			
Earnings				14,433.83	535,389.36	Employee Taxes	2,351.86	100,832.01

Pre Tax Deductions				Post Tax Deductions			
Description	Amount	YTD		Description	Amount	YTD	
401K FA Catch Up	0.00	7,500.00		ESPP Prior Year		-46.94	
401K	721.16	17,176.84		ESPP	1,000.00	17,000.00	
Dental Insurance	24.00	384.00		Expense Reimbursement		-5,027.34	
FAFDC Bonus Prior		86,737.50					
FAFDC Salary	3,750.01	63,750.17					
Employee HSA Contribution	250.00	4,000.00					
Medical Insurance	188.50	3,016.00					
Vision Insurance	30.59	489.44					
Pre Tax Deductions	4,964.26	183,053.95		Post Tax Deductions	1,000.00	11,925.72	

Taxable Wages		
Description	Amount	YTD
OASDI - Taxable Wages	0.00	168,600.00
Medicare - Taxable Wages	13,940.74	526,599.92
Federal Withholding - Taxable Wages	9,469.57	351,435.41

	Federal	State	Absence Plans			
Marital Status	Married filing jointly (or Qualifying widow(er))		Description	Accrued	Reduced	Available
Allowances	0	0	State Sick	0	0	40
Additional Withholding	0					

Payment Information				
Bank	Account Name	Account Number	USD Amount	Amount
Wellsfargo	Wellsfargo	*****7462		6,106.96 USD



First American

Endpoint Technologies, LLC 2101 E. El Segundo Boulevard, Ste 104 El Segundo, CA 90245 +1 866-908-6962
Rajesh Bhatia 3452 S Stuart Ave Gilbert, AZ 85297

Name	Company	Employee ID	Pay Period Begin	Pay Period End	Check Date	Check Number
Rajesh Bhatia	Endpoint Technologies, LLC	631383	07/14/2024	07/27/2024	08/02/2024	

	Hours Worked	Gross Pay	Pre Tax Deductions	Employee Taxes	Post Tax Deductions	Net Pay
Current	80.00	14,423.08	4,964.26	2,351.85	33.10	7,073.87
YTD	1,232.00	519,894.28	178,089.69	98,480.15	10,925.72	232,398.72

Earnings						Employee Taxes		
Description	Dates	Hours	Rate	Amount	YTD	Description	Amount	YTD
Bonus YE Previous			0		289,125.00	OASDI	0.00	10,453.20
GTL	07/14/2024 - 07/27/2024	0	0	10.75	161.25	Medicare	327.60	10,247.49
Holiday			0		8,653.86	Federal Withholding	1,835.07	70,943.33
Employer HSA Contribution			0		900.00	State Tax - AZ	189.18	6,836.13
Regular Pay	07/14/2024 - 07/27/2024	80	0	14,423.08	222,115.42			
Earnings				14,433.83	520,955.53	Employee Taxes	2,351.85	98,480.15

Pre Tax Deductions				Post Tax Deductions			
Description	Amount	YTD		Description	Amount	YTD	
401K FA Catch Up	0.00	7,500.00		ESPP Prior Year		-46.94	
401K	721.16	16,455.68		ESPP	1,000.00	16,000.00	
Dental Insurance	24.00	360.00		Expense Reimbursement	-966.90	-5,027.34	
FAFDC Bonus Prior		86,737.50					
FAFDC Salary	3,750.01	60,000.16					
Employee HSA Contribution	250.00	3,750.00					
Medical Insurance	188.50	2,827.50					
Vision Insurance	30.59	458.85					
Pre Tax Deductions	4,964.26	178,089.69		Post Tax Deductions	33.10	10,925.72	

Taxable Wages		
Description	Amount	YTD
OASDI - Taxable Wages	0.00	168,600.00
Medicare - Taxable Wages	13,940.74	512,659.18
Federal Withholding - Taxable Wages	9,469.57	341,965.84

	Federal	State	Absence Plans			
Marital Status	Married filing jointly (or Qualifying widow(er))		Description	Accrued	Reduced	Available
Allowances	0	0	State Sick	0	0	40
Additional Withholding	0					

Payment Information				
Bank	Account Name	Account Number	USD Amount	Amount
Wellsfargo	Wellsfargo	*****7462		7,073.87 USD



Portfolio By Wells Fargo®

RAJESH BHATIA
SHEELA B SATPUTE
3452 S STUART AVE
GILBERT AZ 85297-7847

Questions? Please contact us:

Wells Fargo Premier Banking TeamSM

Available 24 hours a day, 7 days a week

We accept all relay calls, including 711

Phone: **1-800-742-4932**

Spanish: 1-877-727-2932

Online: wells Fargo.com

Write: Wells Fargo Bank, N.A.

P.O. Box 6995

Portland, OR 97228-6995

June 30, 2021

Qualifying Balance: \$1,810,353.91



Your Portfolio by Wells Fargo overview

Assets

Account (Account Number)	Balance this month (\$)
Wells Fargo Prime Checking (158487462)	18,099.45
Wells Fargo Way2Save® Savings (6229068553)	40,002.34
Wells Fargo Way2Save® Savings (7229148346)	40,002.56
Standard Brokerage * (15574741)	964,999.78
Individual Retirement Account  * (11833207)	747,249.78
Total assets	\$1,810,353.91

- * **Investment and Insurance Products are:**
- Not Insured by the FDIC or Any Federal Government Agency
 - Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate
 - Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested

 Retirement Account - An account that Wells Fargo classifies as a retirement account.

Important Account Information

Effective August 9, 2021, for the Portfolio by Wells Fargo® program, ATM transactions where the surcharge fee is not provided to Wells Fargo from a non-Wells Fargo ATM owner/operator, customers will receive a \$4.00 reimbursement per transaction as follows:

Portfolio by Wells Fargo Select SM* - programs with a statement-ending qualifying balance of less than \$250,000: reimbursed surcharge fees on non-Wells Fargo ATMs withdrawals: one in the U.S. and one International per fee period.

Portfolio by Wells Fargo Signature SM*,** - programs with a statement-ending qualifying balance of \$250,000 or more: reimbursed surcharge fees on non-Wells Fargo ATMs withdrawals: unlimited in the U.S. and International.

*All qualifying linked accounts (including your Wells Fargo Portfolio Checking account) make up your Portfolio by Wells Fargo statement-ending qualifying balance, which determines your program tier.

**Portfolio by Wells Fargo Signature benefits are not available until after the first month with a statement-ending qualifying balance of \$250,000 or more.



Your Portfolio by Wells Fargo overview (continued)

Important Account Information

We're adding some benefits to the Portfolio by Wells Fargo® program, effective August 9, 2021. The noted benefits below apply only to the primary Wells Fargo Portfolio Checking or Wells Fargo Prime Checking account within your Portfolio by Wells Fargo program.

Here's what we're adding to the Portfolio by Wells Fargo Select SM tier:

- We'll waive the Overdraft Protection Transfer fee for one transfer per fee period from a savings account.
- Enjoy a 1% discount on the exchange rate for foreign currency purchases, when you purchase foreign currency through the Wells Fargo Foreign Currency call center, online at wellsfargo.com, or through a Wells Fargo branch. You'll also get an additional 1% when you exchange foreign currency at a Wells Fargo branch.

Here's what we're adding to the Portfolio by Wells Fargo Signature SM tier*:

- We'll waive the fee for online outgoing wire transfers.
- Enjoy a 2% discount on the exchange rate for foreign currency purchases, when you purchase foreign currency through the Wells Fargo Foreign Currency call center, online at wellsfargo.com, or through a Wells Fargo branch. You'll also get an additional 2% when you exchange foreign currency at a Wells Fargo branch.

We calculate your qualifying balance monthly. When your statement-ending qualifying balance is \$250,000 or more, you automatically move into the Portfolio by Wells Fargo Signature tier and the monthly service fee will be waived. Periodically, Wells Fargo will review the accounts in the Portfolio by Wells Fargo Signature tier and, if you have less than \$250,000 in statement-ending qualifying balances, we will notify you at least 30 days in advance that we will transition you into the Portfolio by Wells Fargo Select tier.

For details about the Portfolio by Wells Fargo program, please refer to the disclosures we provided you when you opened your account. If you need another copy of the disclosures, you can find them at www.wellsfargo.com/depositdisclosures. You can also get them at a branch or by calling 1-800-742-4932.

*Portfolio by Wells Fargo Signature benefits are not available until after the first month with a statement-ending qualifying balance of \$250,000 or more.

Important Account Information

If your Portfolio by Wells Fargo program is closed or an account is delinked from the program, then effective immediately, Portfolio by Wells Fargo benefits no longer apply, including benefits to your linked accounts. You'll no longer receive discounts, options to avoid fees on other products or services, or the Portfolio Relationship Interest Rate; for time accounts (CDs), this change will occur at renewal. Your delinked account will revert to the Bank's current applicable interest rate or fee at that time. If the program is closed, the Wells Fargo Portfolio Checking account or Wells Fargo Prime Checking account will be converted to a Wells Fargo non-interest bearing checking account.



Your Portfolio by Wells Fargo overview (continued)

Important Account Information

"Your Portfolio by Wells Fargo overview" section of your statement is provided for informational and convenience purposes. The balances in the Overview section may not match your statement of record for brokerage products due to differences in statement periods between this statement and the statement for your brokerage products. The Overview section shows activity and information from (1) deposit, trust and foreign exchange accounts with Wells Fargo Bank, N.A., (2) brokerage accounts with Wells Fargo Advisors, which is a trade name used by Wells Fargo Clearing Services, LLC, and Wells Fargo Advisors Financial Network, LLC, Members SIPC, registered broker-dealers and separate non-bank affiliates of Wells Fargo & Company; and (3) insurance products offered through non-bank insurance agency affiliates of Wells Fargo & Company and underwritten by unaffiliated insurance companies.

Investment and Insurance Products are:

- **Not Insured by the FDIC or Any Federal Government Agency**
- **Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate**
- **Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested**

Deposit products offered by Wells Fargo Bank, N.A. Member FDIC.

Important Account Information

To support upcoming changes to the Portfolio by Wells Fargo program we are making changes to your statement, effective May 31, 2021. The Total Liabilities line on the front page has been removed since credit accounts are no longer eligible to be linked to a Portfolio by Wells Fargo program. Loan information will no longer appear in your Portfolio by Wells Fargo statement. In addition, the Table of Contents section has been removed.

These changes will not impact other account statements you receive from Wells Fargo.

Look for other upcoming changes in the months ahead.



Wells Fargo Prime Checking

Statement period activity summary

Balance on 6/1	20,397.69
Deposits/Additions	44,024.38
Withdrawals/Subtractions	- 46,322.62
Balance on 6/30	\$18,099.45

Account number: **158487462****RAJESH BHATIA**
SHEELA B SATPUTE

Wells Fargo Bank, N.A. (Member FDIC)

CALIFORNIA account terms and conditions apply

Questions about your account: **1-800-742-4932**Worksheet to balance your account and General
Statement Policies can be found towards the
end of this statement.

Interest you've earned

Interest paid this statement	\$0.23
Interest earned this statement period	\$0.23
Average collected balance	\$28,405.04
Annual percentage yield earned	0.01%
Interest paid this year	\$1.31

Transaction history

Date	Description	Check No.	Deposits/ Additions	Withdrawals/ Subtractions	Ending Daily Balance
Beginning balance on 6/1					20,397.69
6/1	Mobile Deposit : Ref Number :020010698964		3,195.16		
6/1	ATM Withdrawal Authorized On 05/29 3222 E. Ray Rd Gilbert AZ 0002145 ATM ID 9912S Card 1011			300.00	
6/1	ATM Withdrawal Authorized On 05/31 1100 W. Queen Creek Chandler AZ 0007390 ATM ID 4655L Card 9096			300.00	
6/1	WF Home Mtg Auto Pay 060121 Xxxxxx3813 Rajesh Bhatia			4,814.86	
6/1	Srp Surepay-S1 210601 Xxxx8005 Bhatia Rajesh			199.86	17,978.13
6/3	Southwest Gas BILLPAY 210602 B2115314170352 Rajesh Bhatia			70.25	
6/3	Chase Credit Crd Autopay 210602 000000000083833 Bhatia Rajesh K			381.43	
6/3	Td Ameritrade ACH IN Argky5Dt49 Bhatia Rajesh			3,000.00	14,526.45
6/4	Infusionsoft Direct Dep 210604 728080673368Ryz Bhatia,Rajesh		10,326.91		24,853.36
6/7	eDeposit IN Branch/Store 06/07/21 11:21:47 Am 4301 W William Cannon Dr Austin TX		1,472.00		
6/7	Fid Bkg Svc LLC Moneyline 210607 6182722451D3A8P Rajesh K Bhatia			1,000.00	
6/7	Fid Bkg Svc LLC Moneyline 210607 6182722461D3A8Y Rajesh K Bhatia			1,000.00	
6/7	Paypal Inst Xfer 210607 Doordashinc Rajesh Bhatia			4.20	24,321.16
6/8	Gilbert Unified Reg Salary 210608 135910 Satpute Sheela		843.12		25,164.28
6/9	Gerson Lehrman G 9002656440 9002656440 Rajesh Bhatia		45.00		
6/9	Somerset Homeown Debtsom 210608 146 Bhatia			195.00	25,014.28
6/10	Acl Property Mgm Sigonfile 061021 Sstby Rajesh Bhatia		2,250.00		27,264.28
6/14	Venmo Payment 210612 1014166662677 Rajesh Bhatia			200.00	27,064.28
6/15	Banana R CC Br Epay 061321 Xxxx9631 6018590075480928			30.43	
6/15	Venmo Payment 210615 1014215351235 Rajesh Bhatia			75.00	26,958.85
6/17	Tom Mackey Real Sigonfile 061721 1C3Py Rajesh Bhatia		1,104.00		
6/17	Citi Autopay Payment 210616 080460530691689 Rajesh Bhatia			2,345.34	
6/17	Paypal Inst Xfer 210617 Roblox Corp Rob Rajesh Bhatia			4.99	
6/17	Paypal Inst Xfer 210617 Phoneclub Rajesh Bhatia			10.00	25,702.52
6/18	Infusionsoft Direct Dep 210618 786079523156Ryz Bhatia,Rajesh		10,326.91		36,029.43
6/22	Gilbert Unified Reg Salary 210622 135910 Satpute Sheela		253.12		36,282.55
6/24	Bill Pay Hamilton Heights C. Recurring Xxm0034 On 06-24			96.00	36,186.55
6/25	ATM Withdrawal Authorized On 06/25 1755 Broadway & 56Th NEW York NY 0000001 ATM ID 9863Z Card 1011			300.00	35,886.55

 Wells Fargo Prime Checking (continued)

<i>Date</i>	<i>Description</i>	<i>Check No.</i>	<i>Deposits/ Additions</i>	<i>Withdrawals/ Subtractions</i>	<i>Ending Daily Balance</i>
6/28	ATM Check Deposit On 06/26 422 Post Rd East Westport CT 0000244 ATM ID 0115G Card 9096		14,152.93		
6/28	Bill Pay Wells Fargo Home Recurring 0341348Xxx On 06-28			1,000.00	
6/28	Bill Pay Wells Fargo Home Recurring 0337145Xxx On 06-28			6,200.00	
6/28	Bill Pay Studio Walk Owners Association Recurring Xxxx00101 On 06-28			355.00	
6/28	Bill Pay Central Mortgage Company Recurring Xxxx10859 On 06-28			2,300.00	
6/28	Check	478		2,310.00	
6/28	Check	477		3,600.00	
6/28	Paypal Inst Xfer 210628 Netflix.Com Rajesh Bhatia			13.99	34,260.49
6/29	Bill Pay WFHM - 708 Firs Recurring 0312757Xxx On 06-29			1,700.00	
6/29	Bill Pay Hayward Tms Recurring Xxxx57802 On 06-29			2,100.00	
6/29	ATM Withdrawal Authorized On 06/29 422 Post Rd East Westport CT 0000510 ATM ID 0115G Card 1011			300.00	
6/29	Paypal Inst Xfer 210629 Auwagner Rajesh Bhatia			1,515.00	28,645.49
6/30	Gerson Lehrman G 9002697196 9002697196 Rajesh Bhatia		55.00		
6/30	Bill Pay Austin Hoa Recurring XXXXXXXXXXXX23213 On 06-30			35.70	
6/30	Purchase Authorized On 06/30 Patel Brothers 330 Connec Norwalk CT P00301181540836346 Card 1011			65.57	
6/30	ATM Withdrawal Authorized On 06/30 422 Post Rd East Westport CT 0000564 ATM ID 0115G Card 9096			500.00	
6/30	Paypal Inst Xfer 210630 Auwagner Rajesh Bhatia			10,000.00	
6/30	Interest Payment		0.23		18,099.45
Ending balance on 6/30					18,099.45
Totals			\$44,024.38	\$46,322.62	

Summary of checks written (checks listed are also displayed in the preceding Transaction history section)

<i>Number</i>	<i>Date</i>	<i>\$ Amount</i>	<i>Number</i>	<i>Date</i>	<i>\$ Amount</i>
477	6/28	3,600.00	478	6/28	2,310.00

Important Account Information

Effective September 1, 2021, the non-Wells Fargo ATM balance inquiry fee will increase from \$2.00 to \$2.50, and the non-Wells Fargo ATM transfer fee will increase from \$2.00 to \$2.50. To avoid these fees, monitor your balances and transfer money by accessing Wells Fargo ATMs, calling the number on the back of your card, and using Wells Fargo Online® or the Wells Fargo Mobile® app. Availability may be affected by your mobile carrier's coverage area. Your mobile carrier's message and data rates may apply. These fees may not be applicable to all customers and may vary depending on the type of Account you have. For more details, refer to the applicable Wells Fargo Fee and Information Schedule for your Account.

Important Account Information

Effective May 28, 2021, the document copy fee was eliminated and there is no longer a charge for this service. Thank you for banking with Wells Fargo. We appreciate your business.



Wells Fargo Prime Checking (continued)

Important Account Information

NOTICE OF GUIDE TO BENEFITS UPDATES: EFFECTIVE 10/1/2021

Benefit changes to Wells Fargo Visa Platinum Card for Portfolio by Wells Fargo® cardholders

Important information for Wells Fargo Visa Platinum Card for Portfolio by Wells Fargo cardholders: Effective 10/1/2021 the Wells Fargo Visa Platinum Credit Card for Portfolio by Wells Fargo will no longer provide the Extended Warranty Protection, Price Protection, and Trip Cancellation and Trip Interruption benefits. Purchases made on or after 10/1/2021 will not be eligible for these benefits. Claims for these benefits will not be accepted after 9/30/2021. Additionally, effective 10/1/2021, the Worldwide Automatic Common Carrier Travel Accident Insurance benefit amount on this Visa Platinum card will be reduced from \$1,000,000 to \$150,000. All other card benefits will remain in place. This change is only for Wells Fargo Visa Platinum Card for Portfolio by Wells Fargo cardholders.

Important Account Information

The monthly service fee for the Portfolio by Wells Fargo program is \$25 and can be avoided each fee period with \$20,000 or more in statement-ending qualifying linked bank deposit account balances (checking, savings, time accounts (CDs), FDIC-insured IRAs) and investment account balances (brokerage available through our brokerage affiliate Wells Fargo Advisors*, **, Investment & Fiduciary Services, annuities***, ****, and foreign exchange).

*Brokerage products and services are offered through Wells Fargo Advisors. Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC (WFCS) and Wells Fargo Advisors Financial Network, LLC, Members SIPC, separate registered broker-dealers and non-bank affiliates of Wells Fargo & Company.

**Certain brokerage accounts are not eligible.

***Insurance products are offered through non-bank insurance agency affiliates of Wells Fargo & Company and are underwritten by unaffiliated insurance companies.

****If the annuity becomes annuitized, or a periodic payment schedule has been established, the remaining balance will no longer be eligible for qualification.

Investment and Insurance Products are:

- **Not Insured by the FDIC or Any Federal Government Agency**
- **Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate**
- **Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested**

Deposit products offered by Wells Fargo Bank, N.A. Member FDIC.



Wells Fargo Prime Checking (continued)

Important Account Information

Can we reach you when it's really important?

Don't miss suspicious-activity alerts and critical account information. Please make sure your contact information is current by:

- Signing on to wells Fargo.com or the Wells Fargo Mobile® app and navigating to the Update Contact Information page via My Profile
- Contacting the phone number at the top of your statement
- Visiting a branch



Brokerage statement activity begins on the first and ends on the last calendar day of the month.

Brokerage account statement

Account profile

Account type:	Standard Brokerage
Brokerage account number:	15574741
Tax status	Taxable
Investment objective/	
Risk tolerance:*	Moderate Growth
Time horizon:*	Long Term (10+ Years)
Liquidity needs:*	None
Cost basis election:	First in, First out
Sweep option:	Standard Bank Deposit
*For more information, go to www.wellsfargoadvisors.com/disclosures .	

Brokerage document delivery status:	Paper	Electronic
Statements		X
Trade confirmations		X
Tax documents		X
Shareholder communications		X
Other documents		X

This summary of your account(s) is provided for your convenience. You will receive a complete monthly statement of your account(s) separately.

**RAJESH BHATIA
& SHEELA SATPUTE JT WROS**
3452 S STUART AVE
GILBERT AZ 85297-7847

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC (WFCS), a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

To view your account information online, visit: wellsfargoadvisors.com

Customer Service or 24 hour service: 1-866-281-7436

Your Financial Advisor:

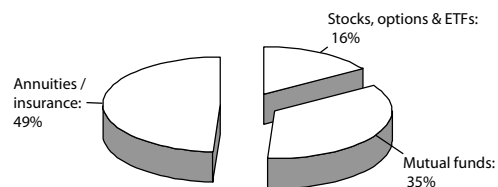
SEAN CHATMAN
866-636-8339

301 UNIVERSITY AVE
2ND / 3RD FLS
PALO ALTO, CA 94301

Portfolio summary

Description	Previous value (\$)	Current value (\$)	Estimated ann. income (\$)
Cash and sweep balances	0.07	0.07	0
Stocks, options & ETFs	150,593.25	155,154.11	1,021
Fixed income securities	0.00	0.00	0
Mutual funds	339,814.69	341,542.08	2,179
Annuities / insurance**	465,109.32	468,303.52	0
Asset value	\$955,517.33	\$964,999.78	\$3,200

Current asset allocation



** Certain assets in this category may not be held in your account. None of the positions are protected by SIPC. If you no longer own any of these investments, please tell us so we can update this section. For important additional information please refer to the disclosures contained in this statement.

Investment and Insurance Products are:

- Not Insured by the FDIC or Any Federal Government Agency
- Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate
- Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested


Brokerage account statement (15574741 continued)

Cash flow summary

	<i>This period</i>	<i>This year</i>
Opening value of cash & sweep	\$0.07	
Income and distributions	411.27	1,082.54
Electronic funds transfers	0.00	50,000.00
Net additions to cash	\$411.27	\$51,082.54
Securities purchased	(411.27)	(51,082.53)
Net subtractions from cash	\$(411.27)	\$(51,082.53)
Closing value of cash & sweep	\$0.07	

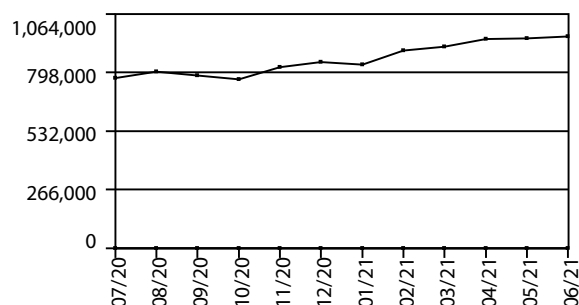
Progress summary

	<i>This period</i>	<i>This year</i>
Opening value	\$955,517.33	\$847,427.18
Cash deposited	0.00	50,000.00
Securities deposited	0.00	0.00
Cash withdrawn	0.00	0.00
Securities withdrawn	0.00	0.00
Income earned	411.27	1,082.54
Change in value	9,071.18	66,490.06
Closing value	\$964,999.78	\$964,999.78

Income summary

	<i>This period</i>	<i>This year</i>
Taxable		
Money market/sweep funds	0.00	0.01
Ordinary dividends & ST cap gains	259.67	650.81
Qualified dividends	151.60	302.95
Total taxable income	\$411.27	\$953.77
Tax-exempt		
Total federal tax-exempt income	\$0.00	\$0.00
Total income	\$411.27	\$953.77

Value over time



Brokerage statement activity begins on the first and ends on the last calendar day of the month.

Retirement Brokerage account statement

Account profile

Account type: Individual Retirement Account
 Brokerage account number: 11833207
 Tax status: Retirement
 Investment objective/
 Risk tolerance*: Aggressive Growth
 Time horizon*: Long Term (10+ Years)
 Liquidity needs*: None
 Cost basis election: First in, First out
 Sweep option: Standard Bank Deposit
 *For more information, go to www.wellsfargoadvisors.com/disclosures.

Brokerage document delivery status:

	Paper	Electronic
Statements		X
Trade confirmations		X
Tax documents		X
Shareholder communications		X
Other documents		X

This summary of your account(s) is provided for your convenience. You will receive a complete monthly statement of your account(s) separately.

RAJESH BHATIA
WFCS CUSTODIAN TRAD IRA
3452 S STUART AVE
GILBERT AZ 85297-7847

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To view your account information online, visit: wellsfargoadvisors.com

Customer Service or 24 hour service: 1-866-281-7436

Your Financial Advisor:

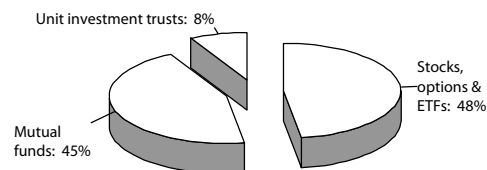
SEAN CHATMAN
866-636-8339

301 UNIVERSITY AVE
2ND / 3RD FLS
PALO ALTO, CA 94301

Portfolio summary

Description	Previous value (\$)	Current value (\$)	Estimated ann. income (\$)
Cash and sweep balances	52.99	52.99	0
Stocks, options & ETFs	345,869.86	355,812.29	3,152
Fixed income securities	0.00	0.00	0
Mutual funds	330,259.32	333,228.10	3,001
Unit investment trusts	58,284.25	58,156.40	663
Asset value	\$734,466.42	\$747,249.78	\$6,816

Current asset allocation



Investment and Insurance Products are:

- Not Insured by the FDIC or Any Federal Government Agency
- Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate
- Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested



Retirement Brokerage account statement (11833207 continued)

Cash flow summary

	<i>This period</i>	<i>This year</i>
Opening value of cash & sweep	\$52.99	
Deposits	0.00	7,000.00
Income and distributions	1,843.60	3,904.42
Net additions to cash	\$1,843.60	\$10,904.42
Securities purchased	(1,843.60)	(10,865.30)
Net subtractions from cash	\$(1,843.60)	\$(10,865.30)
Closing value of cash & sweep	\$52.99	

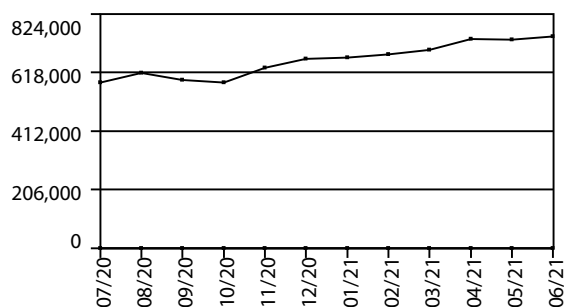
Income summary

	<i>This period</i>	<i>This year</i>
Dividends and short term capital gains	1,180.37	3,207.27
Long term capital gains	663.23	663.23
Total income	\$1,843.60	\$3,870.50

Progress summary

	<i>This period</i>	<i>This year</i>
Opening value	\$734,466.42	\$666,727.29
Cash deposited	0.00	7,000.00
Securities deposited	0.00	0.00
Cash withdrawn	0.00	0.00
Securities withdrawn	0.00	0.00
Income earned	1,843.60	3,904.42
Change in value	10,939.76	69,618.07
Closing value	\$747,249.78	\$747,249.78

Value over time



Worksheet to balance your checking account

1. Go through your check register and mark each check (this includes cancelled, converted and substitute checks that may appear on your statement), withdrawal, ATM transaction, payment, deposit or other credit listed in the "Transaction history" section of your statement. Be sure your register shows any interest or dividends paid into your account and any service charges, automatic payments or transfers withdrawn from your account during this statement period.

2. Using the chart below, list any outstanding, converted or substitute checks, as well as any ATM withdrawals, payments or any other withdrawals (including any from previous months) which are listed in your register but are not shown on your statement.

3. Balance your account by filling in the spaces below.

 ENTER

A The "ending balance" shown on your statement

\$

 ADD

B Any deposits listed in your register or transfers into your account which are not shown on your statement

\$

\$

\$

\$

\$

→ \$

 CALCULATE SUBTOTAL

(Add parts **A** and **B**)

\$

 SUBTRACT

C Total of outstanding checks and withdrawals from the chart at right

-\$

 CALCULATE
ENDING BALANCE

(Part **A** + Part **B** - Part **C**)

This amount should be the same as the current balance shown in your check register.

\$

Items outstanding		
Check number	Amount	
Total	\$	

General statement policies for Wells Fargo Bank

■ To dispute or report inaccuracies in information we have furnished to a Consumer Reporting Agency about your accounts. You have the right to dispute the accuracy of information that Wells Fargo Bank, N.A. has furnished to a consumer reporting agency by writing to us at Overdraft Collection and Recovery, P.O. Box 5058, Portland, OR 97208-5058. Please describe the specific information that is inaccurate or in dispute and the basis for the dispute along with supporting documentation. If you believe the information furnished is the result of identity theft, please provide us with an identity theft report.

■ **Checking account information.** After balancing your checking account, **please report any differences to us as soon as possible but no later than within 30 days.** Special provisions, including a reporting period of up to 60 days, apply if the difference involves an electronic funds transfer. These provisions are explained below.

■ In case of errors or questions about your electronic transfers, telephone us at the number printed on the front of this statement or write us at Wells Fargo Bank, P.O. Box 6995, Portland, OR 97228-6995 as soon as you can, if you think your statement or receipt is wrong or if you need more information about a transfer on the statement or receipt. We must hear from you no later than 60 days after we sent you the FIRST statement on which the error or problem appeared.

- 1. Tell us your name and account number (if any).**
- 2. Describe the error or the transfer you are unsure about, and explain as clearly as you can why you believe it is an error or why you need more information.**
- 3. Tell us the dollar amount of the suspected error.**

We will investigate your complaint and will correct any error promptly. If we take more than 10 business days to do this, we will credit your account for the amount you think is in error, so that you will have the use of the money during the time it takes us to complete our investigation.

■ Deposit and credit products offered by Wells Fargo Bank, N.A.. Member FDIC.





Advisors

COMBINED SNAPSHOT

Current period ending July 31, 2024

PRIMARY ACCOUNT NAME: RAJESH BHATIA
& SHEELA SATPUTE JT WROS

PRIMARY ACCOUNT NUMBER: 1557-4741

Electronic Delivery

Your Financial Advisor:
SEAN CHATMAN
Phone: 866-636-8339

301 UNIVERSITY AVE
PALO ALTO, CA 94301

RAJESH BHATIA
& SHEELA SATPUTE JT WROS
3452 S STUART AVE
GILBERT AZ 85297-7847

Message from Wells Fargo Advisors

HOW DO AMERICANS REALLY FEEL ABOUT MONEY? THE INAUGURAL WELLS FARGO MONEY STUDY SURVEYED AMERICAN ADULTS AND TEENS TO UNCOVER CANDID TRUTHS ABOUT THEIR ATTITUDES TOWARD MONEY. YOU MAY BE SURPRISED BY THE FINDINGS: VISIT [WELLSFARGOADVISORS.COM/MONEYSTUDY](https://wellsfargo.com/moneystudy).

Investment and Insurance Products are:

- Not Insured by the FDIC or Any Federal Government Agency
- Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate
- Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

General instructions and disclosures

About this statement

Clearing services: Wells Fargo Clearing Services, LLC (Wells Fargo Advisors), an indirect wholly owned subsidiary of Wells Fargo & Company, is a clearing broker-dealer registered with the Securities and Exchange Commission (SEC) and the Municipal Securities Rulemaking Board (MSRB) and is a member of the New York Stock Exchange (NYSE), the Financial Industry Regulatory Authority (FINRA) and all principal U.S. exchanges. Wells Fargo Advisors carries your account(s) and acts as your custodian for funds and securities deposited with us directly by you, or as a result of transactions we process for your account. Twice a year, Wells Fargo Advisors publishes on its web site www.wfclearing.com a statement of the firm's financial condition. A financial statement of this organization is available for your personal inspection at its offices, or a copy of it will be mailed upon your written request.

Trade date statement and trade details: All activity and positions on this statement are shown as of the date a trade is entered on the brokerage trading system (i.e., the trade date). Proceeds from the sale of securities and costs for the purchase of securities are not transacted through your account until the actual settlement date of the trade. The time of the transactions, the name of the buyer or seller, and the source and amount of any commission or fee will be furnished upon written request.

Pricing of securities: Securities prices on your statement may vary from actual liquidation value. Prices are provided by outside quotation services which we believe are reliable but due to the nature of market data the accuracy cannot be guaranteed. In the absence of such pricing, prices are estimated by Wells Fargo Advisors using available information and its judgment. Such estimates may not reflect actual trades and do not reflect a commitment by the firm to buy or sell at those prices. Securities listed on a national exchange are priced as of the close of the statement period. Unlisted shares may be valued at the current best published "bid-price", and, if none exists, the last reported transaction if occurring within the last 45 days. Prices of securities not actively traded may not be available and are indicated by "N/A." Corporate and municipal bonds and other fixed income securities are priced by a computerized pricing service or, if less actively traded, by utilizing a yield-based matrix system to arrive at an estimated market value. Listed options are priced based on the closing "bid-ask" prices and the last reported trade. Mutual fund shares are priced at net asset value. Shares of direct participation program (DPP) and real estate investment trust (REIT) securities that are not listed on a national exchange are generally illiquid. Because no trading market exists for these investments, their values are estimated. Unless otherwise indicated, the values shown for DPP and REIT securities have been provided by the management of each program and represent that management's estimate of the investor's interest in the net assets of the program. See statement sections for additional pricing information. Values for hedge funds and certain managed futures funds are provided on a month delay basis. Other managed futures funds may be priced more frequently. Long-term certificates of deposit (maturity beyond one year from date of issue) are priced using a market value pricing model. The sale or redemption price of your securities may be higher or lower than the prices shown on your statement. For an actual quote, contact the individual servicing your account.

Estimated annual income/yield: Estimated Annual Income (EAI), when available, reflects the estimated amount you would earn on a security if your current position and its related income remained constant for a year. Estimated Annual Yield (EAY), when available, reflects the current estimated annual income divided by the current value of the security as of the statement closing date. EAI and EAY are estimates and the actual income and yield might be lower or higher than the estimated amounts. EAY reflects only the income generated by an investment. It does not reflect changes in its price, which may fluctuate. The information used to derive these estimates is obtained from various outside vendors; Wells Fargo Advisors is not responsible for incorrect or missing estimated annual income and yields. Past performance is not a guarantee of future results.

Income summary: The Income summary displays all income as recorded in the tax system as of period end date. The totals in the Cash flow snapshot may not match the totals in the Income snapshot due to reclassifications or other corrections made in the tax system. Remember, you may have certain products that are not included in these figures and whose income is only available on the tax forms sent to you at year-end. Reclassifications and other tax reporting requirements may alter these numbers both during and after year end. You should rely only on tax reporting documents. Contact your tax advisor if you have any questions about the tax consequences of your brokerage activity.

Texas designation: If you are a resident of Texas who has purchased mutual fund shares, you may designate a representative to receive notification to assist in avoiding escheatment of assets in your investment account to the State of Texas. The designated representative does not have any rights to your account. Please use the Texas Unclaimed Property link (<https://claimtexas.org/>) to access the Designation of Representative for Notice Request form which you may complete and return to us at **ATTN: H0006-08K, 1 N. Jefferson Ave, St. Louis, MO 63103** or return by email at clientcontact@firstclearing.com.

Tax reporting: We are required by federal law to report annually to you and to the Internal Revenue Service (IRS) on Form(s) 1099 interest income, dividend payments and sales proceeds including cost basis information for applicable transactions credited to your account.

About your rights and responsibilities

Questions and complaints about Your Account: This account statement contains important information about your brokerage account, including recent transactions. All account statements sent to you shall be deemed complete and accurate if not objected to in writing within ten days of receipt. We encourage you to review the details in this statement. If you do not understand any of the information in your statement or if you believe there are any inaccuracies or discrepancies in your statement, you should promptly report them to the manager of the Wells Fargo Advisors office listed on the front of your statement. To further protect your rights, including any rights under the Securities Investor Protection Act, any verbal communications with Wells Fargo Advisors should be re-confirmed in writing. Inquiries or complaints about your account statement, including the positions and balances in your account, may be directed to **Wells Fargo Advisors Client Services at (866) 887-2402 or ATTN: H0005-087, 1 N. Jefferson Ave, St. Louis, MO 63103**.

Public disclosure: You may reach FINRA by calling the FINRA BrokerCheck Hotline at **(800) 289-9999** or by visiting the FINRA website at www.finra.org. An investor brochure that includes information describing FINRA BrokerCheck is available from FINRA upon request. A brochure describing the FINRA Pricing of Securities Regulation Public Disclosure Program is also available from the FINRA upon request.

MSRB disclosure: A brochure describing the protections available under MSRB rules and how to file a complaint is available at www.MSRB.org.

Account protection: Wells Fargo Advisors is a member of the Securities Investor Protection Corporation (SIPC) which protects against the loss of cash and securities held in client accounts of a SIPC member firm in the event of the member's insolvency and liquidation. SIPC coverage is limited to \$500,000 per customer, including up to \$250,000 for cash. For more information on SIPC coverage, please see the explanatory brochure at www.sipc.org or contact SIPC at **(202) 371-8300**. In addition, Wells Fargo Advisors maintains additional insurance coverage provided through London Underwriters (led by Lloyd's of London Syndicates). This additional insurance policy becomes available to clients if their SIPC limit is exhausted and provides additional protection up to a firm aggregate of \$1 billion, including up to \$1.9 million for cash per client. SIPC does not insure the quality of investments or protect against market losses. SIPC only protects the custody function of their members, which means that SIPC works to restore to clients their securities and cash that are in their accounts when the member firm liquidation begins. Not all investments are protected by SIPC. In general, SIPC does not cover instruments such as unregistered investment contracts, unregistered limited partnerships, fixed annuity contracts, escrow receipts, direct investments, currency, commodities or related contracts, hedge funds and certain other investments.

Investor education: Wells Fargo Advisors publishes on its web site www.wellsfargoadvisors.com information on topics of interest to investors as well as market commentary and economic analysis. This information may be found in the "Other Insights" menu. Wells Fargo Advisors has also developed numerous investor education guides to provide you with important information regarding the products and services we offer. These guides may be found in the "Why Invest With Us" menu.

Free credit balances: Free credit balances are not segregated and may be used by Wells Fargo Advisors in the operation of its business in accordance with applicable laws and regulations. You have the right to receive from us in the course of normal business operations, subject to any open commitments in any of your accounts, any free credit balances to which you are entitled.

Investment objectives/Risk tolerances: Please inform us promptly of any material change that might affect your investment objectives, risk tolerances or financial situation, or if you wish to impose or change any reasonable restrictions on the management of your account. A copy of the Investment Advisory Services Disclosure document is available without charge upon request. Please contact the individual denoted on the front of your statement to update your information and to receive a copy of this document.

Option accounts: Pursuant to FINRA Rule 2360, option assignment notices are randomly allocated by an automated process amongst all client short option positions that are subject to exercise, including positions established on the day of assignment. Transaction confirmations that were previously furnished to you provides information on commissions and other charges related to your option transaction executions. Details of our random allocation procedures and copies of transaction confirmations are available upon request.



Advisors

COMBINED SNAPSHOT

RAJESH BHATIA
& SHEELA SATPUTE JT WROS

July 1, 2024 - July 31, 2024
PRIMARY ACCOUNT NUMBER: 1557-4741

Your Financial Advisor

Please visit us at: www.wellsfargoadvisors.com

SEAN CHATMAN
Phone: 866-636-8339

301 UNIVERSITY AVE
PALO ALTO, CA 94301

What's inside your Combined Snapshot ...

ACCOUNT NAME	STATEMENT ENCLOSED	ACCOUNT NUMBER	TAX STATUS	PREVIOUS VALUE ON JUN 30	NET CHANGE	CURRENT VALUE ON JUL 31
RAJESH BHATIA WFCS CUSTODIAN TRAD IRA	Yes	1183-3207	Retirement	969,841.56	20,817.86	990,659.42
RAJESH BHATIA & SHEELA SATPUTE JT WROS	Yes	1557-4741	Taxable	1,423,627.15	17,011.31	1,440,638.46
Total				\$2,393,468.71	\$37,829.17	\$2,431,297.88

If an account is closed or de-linked from a statement linked relationship, then the account's Year to Date values will no longer display as part of the Combined Snapshot values.

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Advisors

COMBINED SNAPSHOT

RAJESH BHATIA
& SHEELA SATPUTE JT WROS

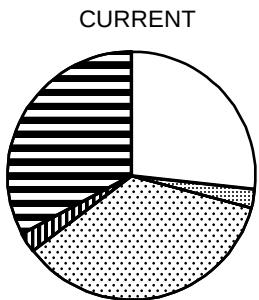
July 1, 2024 - July 31, 2024
PRIMARY ACCOUNT NUMBER: 1557-4741

Combined progress summary

	THIS PERIOD	THIS YEAR
Opening value	\$2,393,468.71	\$2,216,926.66
Cash deposited	0.00	10,112.13
Securities deposited	0.00	0.00
Cash withdrawn	0.00	0.00
Securities withdrawn	0.00	0.00
Change in value	37,829.17	204,259.09
Closing value	\$2,431,297.88	\$2,431,297.88
Estimated accrued interest ^	819.95	
Total value (incl. accruals)	\$2,432,117.83	

^ Estimated accrued interest is included for your convenience. The value represents the estimated portion of the interest that would be received upon the sale of your Fixed Income positions. For more information, see the Specific instructions and disclosures page.

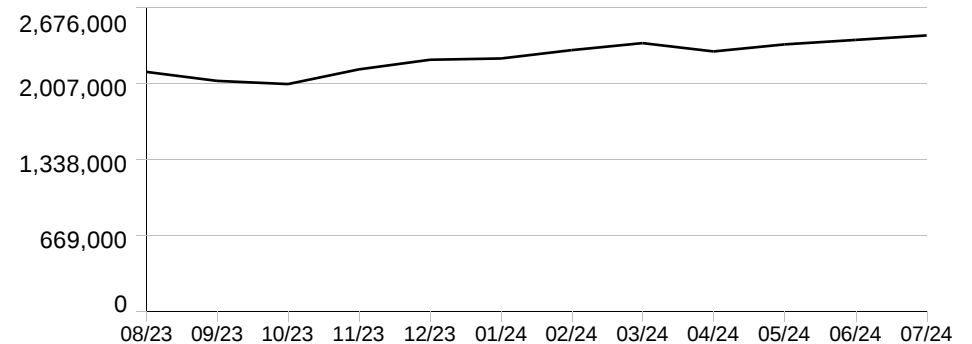
Combined portfolio summary



ASSETS	ASSET TYPE	PREVIOUS		CURRENT		ESTIMATED ANN. INCOME
		VALUE ON JUN 30	%	VALUE ON JUL 31	%	
	Cash and sweep balances	1,313.15	0.05	1,313.43	0.05	3
	Stocks, options & ETFs	647,422.12	27.05	649,552.52	26.72	9,776
	Fixed income securities	59,793.60	2.50	59,876.40	2.46	2,580
	Mutual funds	828,522.13	34.62	860,023.33	35.37	9,552
	Unit investment trusts	62,337.07	2.60	62,479.07	2.57	1,210
	Annuities/insurance #	794,080.64	33.18	798,053.13	32.82	0
	Asset value	\$2,393,468.71	100%	\$2,431,297.88	100%	\$23,121

Certain assets in this category may not be held in your account. None of the positions are protected by SIPC. If you no longer own any of these investments, please tell us so we can update this section. For important additional information please refer to the disclosures contained in this statement.

Value over time



COMBINED SNAPSHOT

RAJESH BHATIA
& SHEELA SATPUTE JT WROS

July 1, 2024 - July 31, 2024
PRIMARY ACCOUNT NUMBER: 1557-4741

Combined cash flow summary

	THIS PERIOD	THIS YEAR
Opening value of cash and sweep balances	\$1,313.15	
Deposits	0.00	10,112.13
Income and distributions	6,137.00	13,452.23
Net additions to cash	\$6,137.00	\$23,564.36
Securities purchased	-6,136.72	-22,267.60
Net subtractions from cash	-\$6,136.72	-\$22,267.60
Closing value of cash and sweep balances	\$1,313.43	

Combined income summary *

	THIS PERIOD	THIS YEAR
TAXABLE ACCOUNTS		
Money market/sweep funds	0.27	0.99
Interest	0.00	1,293.53
Ordinary dividends and ST capital gains	353.66	1,223.95
Qualified dividends	0.00	491.11
Long term capital gains	5,290.21	5,290.21
Taxable income on taxable accounts	\$5,644.14	\$8,299.79
Tax exempt income on taxable accounts	\$0.00	\$0.00
Subtotal income on taxable accounts	\$5,644.14	\$8,299.79
RETIREMENT ACCOUNTS		
Subtotal income on retirement accounts	\$492.86	\$5,152.44
COMBINED SNAPSHOT TOTALS		
Total income on all accounts	\$6,137.00	\$13,452.23

* Certain distributions made in the current year are reported as prior year income according to IRS regulations. This may cause a difference between Cash Flow and Income Summary totals.



PRIMARY ACCOUNT NUMBER: 1557-4741

**PRIMARY ACCOUNT NAME: RAJESH BHATIA
& SHEELA SATPUTE JT WROS**

Specific instructions and disclosures

Callable Securities

Securities that are subject to a partial call will be selected by an impartial lottery process in which the probability of your securities being selected for redemption is proportional to the holdings of all shareholders of such securities held in street name. If a security is called prior to maturity it may affect the yield you receive. Additional information is available at www.wellsfargoadvisors.com under Legal Disclosures or the written procedures are available upon request.

IRA withholding notice

Form W-4R/OMB No. 1545-0074

The withdrawals you receive from your IRA are subject to Federal income tax withholding unless you elect not to have withholding apply. If you have a periodic, or an "on demand" distribution, your election regarding our withholding of Federal income tax on your behalf stays in effect until you change it. You may change or revoke your election at any time and as often as you wish by completing a new election form. If you elect check writing privileges (not available on all IRAs), you will also have previously elected to have no withholding on your withdrawals. If you decide to have taxes withheld you will not be eligible for check writing from your IRA. If you elect not to have taxes withheld you will be liable for payment of all taxes due on the taxable portion of your distribution and you may be responsible for payment of estimated tax. You may be subject to tax penalties under the estimated tax payment rules if your payments of estimated tax and withholding, if any, are not adequate.

Estimated accrued interest on Fixed Income securities

Estimated accrued interest is included in the Portfolio summary as a convenience to you and represents the estimated portion of the interest that would be received upon the sale of the Fixed Income positions in your account, calculated from the date of the last coupon (or dated date) through the date of the account statement, based upon information provided by the issuer. This is not a guarantee that this amount will be realized in your account. Actual income will be based upon the payout schedule of the securities held in your account. If you own a Foreign Fixed Income security, and it is denominated in a foreign currency, the Estimated accrued interest will not be accurate.

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Advisors

SNAPSHOT

Page 1 of 10

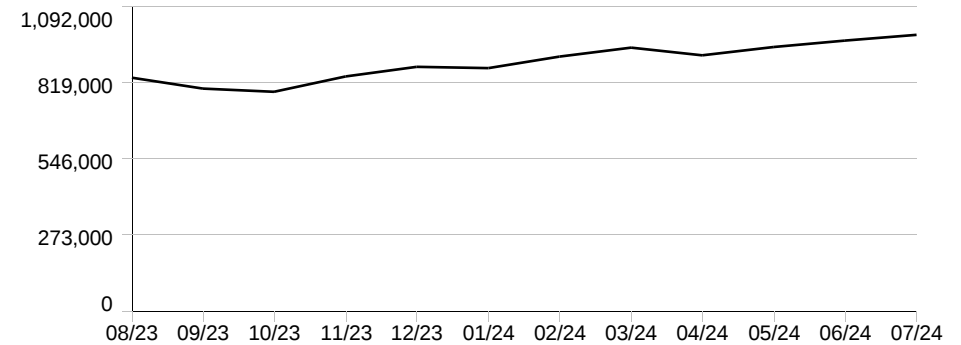
RAJESH BHATIA
WFCS CUSTODIAN TRAD IRA

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1183-3207

Progress summary

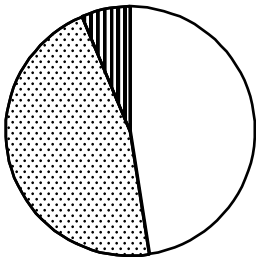
	THIS PERIOD	THIS YEAR
Opening value	\$969,841.56	\$876,297.28
Cash deposited	0.00	10,112.13
Securities deposited	0.00	0.00
Cash withdrawn	0.00	0.00
Securities withdrawn	0.00	0.00
Change in value	20,817.86	104,250.01
Closing value	\$990,659.42	\$990,659.42

Value over time



Portfolio summary

CURRENT



ASSETS

ASSET TYPE	PREVIOUS VALUE ON JUN 30	%	CURRENT VALUE ON JUL 31	%	ESTIMATED ANN. INCOME
Cash and sweep balances	18.87	0.00	18.88	0.00	0
Stocks, options & ETFs	467,476.41	48.20	470,320.56	47.48	8,245
Fixed income securities	0.00	0.00	0.00	0.00	0
Mutual funds	440,009.21	45.37	457,840.91	46.22	5,374
Unit investment trusts	62,337.07	6.43	62,479.07	6.31	1,210
Asset value	\$969,841.56	100%	\$990,659.42	100%	\$14,829

SNAPSHOT



RAJESH BHATIA
WFCS CUSTODIAN TRAD IRA

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1183-3207

Cash flow summary

	THIS PERIOD	THIS YEAR
Opening value of cash and sweep balances	\$18.87	
Deposits	0.00	10,112.13
Income and distributions	492.86	5,152.44
Net additions to cash	\$492.86	\$15,264.57
Securities purchased	-492.85	-15,262.33
Net subtractions from cash	-\$492.85	-\$15,262.33
Closing value of cash and sweep balances	\$18.88	

Income summary *

	THIS PERIOD	THIS YEAR
Money market/sweep funds	0.01	0.62
Dividends and short term capital gains	492.85	4,962.04
Long term capital gains	0.00	189.78
Total income	\$492.86	\$5,152.44

* Certain distributions made in the current year are reported as prior year income according to IRS regulations. This may cause a difference between Cash Flow and Income Summary totals.



JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1183-3207

Retirement summary

IRA Plan Current Value \$990,659.42

A portion of these assets may not be covered by SIPC. Bank products are eligible for FDIC insurance up to \$250,000 in accordance with FDIC rules.
CONTACT US TODAY TO LEARN ABOUT OPTIONS FOR RETIREMENT ASSETS LEFT AT FORMER EMPLOYERS. EACH OPTION HAS ADVANTAGES AND DISADVANTAGES; THE BEST ONE DEPENDS ON YOUR INDIVIDUAL SITUATION. CONSIDER INVESTMENTS CHOICES, FEES AND EXPENSES, AND SERVICES OFFERED.

ACCOUNT INFORMATION

Account Holder Birthdate:	*
Attained Age as of 12/31/24:	*

* Information suppressed at account holder request.

This beneficiary information is based upon the most recent data available and is being provided as a service to you. In the event of death, your most recent beneficiary designation on file will govern.

PRIMARY BENEFICIARY INFORMATION	% ENTITLEMENT
SHEELA SATPUTE	100.00%

RETIREMENT TRANSACTIONS

CONTRIBUTION SUMMARY	AMOUNT
Contributions	
2024 FOR 2024	\$8,000.00
2024 DISTRIBUTION SUMMARY	AMOUNT
Gross Distributions	\$0.00

SNAPSHOT

Page 4 of 10

RAJESH BHATIA
WFCS CUSTODIAN TRAD IRA

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1183-3207

Your Financial Advisor

SEAN CHATMAN
Phone: 866-636-8339

301 UNIVERSITY AVE
PALO ALTO, CA 94301

Account profile

Full account name:	RAJESH BHATIA
Account type:	WFCS CUSTODIAN TRAD IRA
Brokerage account number:	Individual Retirement Account
Tax status:	1183-3207
Investment objective/Risk tolerance:*	Retirement
Time horizon:*	AGGRESSIVE GROWTH
Liquidity needs:*	LONG TERM (10+ YEARS)
Cost Basis Election:	NONE
Sweep option:	First in, First out
	STANDARD BANK DEPOSIT

*For more information, please visit us at: www.wellsfargoadvisors.com/disclosures

Client service information

Client service:	866-281-7436
Website:	www.wellsfargoadvisors.com

For your consideration

Go paperless. Accessing your account documents online is easy, secure, and costs nothing. Sign on at wellsfargoadvisors.com, go to **Portfolio** and select **Statements & Docs**, and then click on the **Delivery Preferences** link. Choose **Paperless - All Docs** or view your Delivery Settings details to select specific account documents for paperless delivery. If you do not have a Username and Password, visit wellsfargoadvisors.com/signup or call 1-877-879-2495 for enrollment assistance.

Document delivery status

Email Address: BHATIA_RAJESH@YAHOO.COM

	Paper	Electronic
Statements:		X
Trade confirmations:		X
Tax documents:		X
Shareholder communications:		X
Other documents:		X



Portfolio detail

Cash and Sweep Balances

Sweep Balances - You have the right, in the course of normal business operations, to withdraw balances in the Bank Deposit Sweep Program(s) or redeem shares of the money market mutual fund used in the sweep, subject to any open commitments in any of your accounts and have the proceeds returned to your accounts or remitted to you. The money market mutual funds in the sweep reserve the right to require one or more day's prior notice before permitting withdrawals.

Standard Bank Deposit Sweep - Consists of monies generally first held at Wells Fargo Bank, N.A. and (if amounts exceed \$250,000) at one or more Wells Fargo affiliated banks.

Expanded Bank Deposit Sweep - Consists of monies held at Wells Fargo Bank, N.A. unless indicated otherwise on our public website and (if amounts exceed \$250,000) at one or more Wells Fargo affiliated or nonaffiliated banks.

Brokered Liquid Deposit - Consists of monies held at one or more program bank(s), as described in the Brokered Liquid Deposit Disclosure.

Assets in the Bank Deposit Sweep Program and Brokered Liquid Deposit are not covered by SIPC, but are instead eligible for FDIC insurance of up to \$250,000 per depositor, per institution, in accordance with FDIC rules. For additional information, please contact Your Financial Advisor.

DESCRIPTION	% OF ACCOUNT	ANNUAL PERCENTAGE YIELD EARNED*	CURRENT MARKET VALUE	ESTIMATED ANNUAL INCOME
STANDARD BANK DEPOSIT	0.00	0.626	18.88	0.00
Interest Period 07/01/24 - 07/31/24				
Total Cash and Sweep Balances	0.00		\$18.88	\$0.00

* APYE measures the total amount of the interest paid on an account based on the interest rate and the frequency of the compounding during the interest period. The annual percentage yield earned is expressed as an annualized rate, based on a 365 day year.

Bank Deposit Allocation

Monies on deposit at each bank are eligible for FDIC insurance of up to \$250,000 per depositor, per bank in accordance with FDIC rules. In those instances where deposit balances exceed the maximum FDIC insurance limits, those deposits will be uninsured. Deposits at each bank are not held in your securities brokerage account and therefore not covered by SIPC. Settlement timing differences will cause balances displayed in this section to vary from those indicated in the Portfolio detail section due to activity that occurs after 2pm ET on the last business day of the month. For additional information, please contact Your Financial Advisor.

DESCRIPTION	FDIC CERT NUMBER	CURRENT VALUE	AS OF VALUE DATE
WELLS FARGO BANK, N.A.	3511	18.88	07/31
Total Bank Deposits		\$18.88	

RAJESH BHATIA
WFCS CUSTODIAN TRAD IRA

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1183-3207

Stocks, options & ETFs

Stocks and ETFs

DESCRIPTION	% OF ACCOUNT	QUANTITY	CURRENT PRICE	CURRENT MARKET VALUE	ESTIMATED	
					ANNUAL INCOME	ANNUAL YIELD (%)
ALTRIA GROUP INC MO On Reinvestment	1.74	352.09000	49.0100	17,255.93	1,380	7.99
AMAZON COM INC AMZN On Reinvestment	11.70	620	186.9800	115,927.60	N/A	N/A
APPLE INC AAPL On Reinvestment	4.56	203.59500	222.0800	45,214.37	204	0.45
ENERGY SELECT ETF SECTOR SPDR XLE On Reinvestment	1.81	192.78600	93.2100	17,969.58	564	3.13
INVESTCO DB COMMODITY ETF INDEX TRACKING FD UNIT DBC On Reinvestment	3.40	1,492.75000	22.5800	33,706.29	1,626	4.82
ISHARES ETF U.S. CONSUMER STAPLES IYK On Reinvestment	5.67	827.51400	67.9000	56,188.20	1,503	2.67
ISHARES ETF TRANSPORTATION AVERAGE IYT On Reinvestment	4.09	614.58400	65.9800	40,550.25	503	1.23
ISHARES MSCI ETF SOUTH AFRICA EZA On Reinvestment	1.41	307.89700	45.5100	14,012.39	349	2.48
ISHARES MSCI TAIWAN ETF EWT On Reinvestment	4.41	822.51400	53.1400	43,708.39	1,471	3.36
MICROSOFT CORP MSFT On Reinvestment	4.40	104.25100	418.3500	43,613.40	313	0.71



Advisors

RAJESH BHATIA
WFCS CUSTODIAN TRAD IRA

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1183-3207

Stocks, options & ETFs

Stocks and ETFs continued

DESCRIPTION	% OF ACCOUNT	QUANTITY	CURRENT PRICE	CURRENT MARKET VALUE	ESTIMATED	
					ANNUAL INCOME	ANNUAL YIELD (%)
SOLVENTUM CORP SOLV On Reinvestment	0.16	26.87600	58.8800	1,582.45	N/A	N/A
SPDR GOLD TRUST ETF GLD	2.56	112	226.5500	25,373.60	N/A	N/A
3M CO MMM On Reinvestment	1.54	119.31100	127.5500	15,218.11	334	2.19
Total Stocks and ETFs	47.48			\$470,320.56	\$8,245	1.75
Total Stocks, options & ETFs	47.48			\$470,320.56	\$8,245	1.75

Mutual Funds

Open End Mutual Funds

Open End Mutual Fund shares are priced at net asset value. Estimated Annual Income and Yield refer to Dividends and Interest Income only, and typically do not reflect Total return.

DESCRIPTION	% OF ACCOUNT	QUANTITY	CURRENT PRICE	CURRENT MARKET VALUE	ESTIMATED	
					ANNUAL INCOME	ANNUAL YIELD (%)
INVESCO EQV ASIA PACIFIC EQUITY FUND CLASS A ASIA On Reinvestment	5.48	1,906.66600	28.4900	54,320.91	505	0.93
INVESCO GLOBAL REAL ESTATE A AGREX On Reinvestment	1.91	2,107.64700	8.9600	18,884.51	344	1.81
EATON VANCE DIVIDEND BUILDER FUND CLASS A EVTMX On Reinvestment	9.35	5,678.77100	16.3100	92,620.75	1,454	1.56

RAJESH BHATIA
WFCS CUSTODIAN TRAD IRA

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1183-3207

Mutual Funds

Open End Mutual Funds continued

DESCRIPTION	% OF ACCOUNT	QUANTITY	CURRENT PRICE	CURRENT MARKET VALUE	ESTIMATED	
					ANNUAL INCOME	ANNUAL YIELD (%)
MAINSTAY CBRE REAL ESTATE FUND CLASS A CLARX On Reinvestment	2.55	3,006.58700	8.4000	25,255.33	848	3.35
FUNDAMENTAL INVS INC CLASS A ANCFX On Reinvestment	3.19	384.23400	82.2200	31,591.71	261	0.82
MFS UTILITIES FUND CLASS A MMUFX On Reinvestment	3.09	1,352.66300	22.6000	30,570.18	615	2.01
NATIONWIDE MUT FDS NEW GENEVA SM CAP GROWTH FD CL A NWHZX On Reinvestment	5.90	696.35700	83.9500	58,459.17	N/A	N/A
NEUBERGER BERMAN EQTY FDS LARGE CAP VALUE FD CLASS C NPNCX On Reinvestment	9.08	1,963.25000	45.8200	89,956.11	1,133	1.25
DAVIS FINANCIAL FUND CL A RPFGX On Reinvestment	1.30	212.00900	60.6800	12,864.70	214	1.66
PUTNAM FOCUSED EQUITY FUND CLASS A PGIAX On Reinvestment	4.37	1,258.86500	34.4100	43,317.54	N/A	N/A
Total Open End Mutual Funds	46.22			\$457,840.91	\$5,374	1.17
Total Mutual Funds	46.22			\$457,840.91	\$5,374	1.17



Advisors

RAJESH BHATIA
WFCS CUSTODIAN TRAD IRA

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1183-3207

Unit Investment Trusts

Equity Trusts

DESCRIPTION	% OF ACCOUNT	QUANTITY	CURRENT PRICE	CURRENT MARKET VALUE	ESTIMATED	
					ANNUAL INCOME	ANNUAL YIELD (%)
FIRST TRUST INTL CAPITAL STRENGTH PORTFOLIO SERIES 61 R CUSIP 30333D510	6.31	5,679.91600	11.0000	62,479.07	1,210	1.93
Total Equity Trusts	6.31			\$62,479.07	\$1,210	1.94
Total Unit Investment Trusts	6.31			\$62,479.07	\$1,210	1.94

Activity detail

DATE	ACCOUNT TYPE	TRANSACTION/ CHECK NUMBER	QUANTITY	DESCRIPTION	PRICE	AMOUNT	CASH AND SWEEP BALANCES
07/01				BEGINNING BALANCE			18.87
07/01	Cash	DIVIDEND		MAINSTAY CBRE REAL ESTATE FUND CLASS A 062824 2,990.54900 AS OF 6/28/24		125.90	
07/01	Cash	REINVEST DIV	16.03800	MAINSTAY CBRE REAL ESTATE FUND CLASS A REINVEST AT 7.850		-125.90	18.87
07/10	Cash	DIVIDEND		ALTRIA GROUP INC 071024 344.89900		338.00	
07/10	Cash	DIVIDEND		EATON VANCE DIVIDEND BUILDER FUND CLASS A 070924 5,676.93800 AS OF 7/09/24		28.95	
07/10	Cash	REINVEST DIV	7.19100	ALTRIA GROUP INC REINVEST AT 47.004		-338.00	
07/10	Cash	REINVEST DIV	1.83300	EATON VANCE DIVIDEND BUILDER FUND CLASS A REINVEST AT 15.790		-28.95	18.87

RAJESH BHATIA
WFCS CUSTODIAN TRAD IRA

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1183-3207

Activity detail continued

DATE	ACCOUNT TYPE	TRANSACTION/ CHECK NUMBER	QUANTITY	DESCRIPTION	PRICE	AMOUNT	CASH AND SWEEP BALANCES
07/31	Cash	INTEREST		STANDARD BANK DEPOSIT 073124 18		0.01	18.88

Cash sweep activity

Our Cash Sweep program allows you to earn a return on the idle cash balances in your account by automatically investing such balances into one of our cash sweep options. These 'sweep transactions' may represent a net amount for the day and occur on settlement date. The following section displays transfers into and out of your sweep option. Transactions displayed here are Transfer To, Transfer From and Reinvested Dividends and Interest. These transaction amounts are not included in your cash flow summary.

DATE	TRANSACTION	DESCRIPTION	AMOUNT	DATE	TRANSACTION	DESCRIPTION	AMOUNT
07/01		BEGINNING BALANCE	18.87	07/31		ENDING BALANCE	18.88
07/31	REINVEST INT	STANDARD BANK DEPOSIT	0.01				



Advisors

SNAPSHOT

Page 1 of 10

RAJESH BHATIA
& SHEELA SATPUTE JT WROS

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1557-4741

Progress summary

	THIS PERIOD	THIS YEAR
Opening value	\$1,423,627.15	\$1,340,629.38
Cash deposited	0.00	0.00
Securities deposited	0.00	0.00
Cash withdrawn	0.00	0.00
Securities withdrawn	0.00	0.00
Change in value	17,011.31	100,009.08

Closing value **\$1,440,638.46** **\$1,440,638.46**

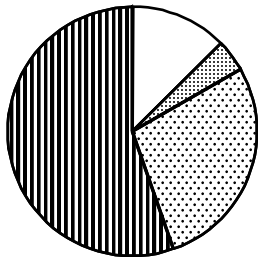
Estimated accrued interest ^ 819.95

Total value (incl. accruals) **\$1,441,458.41**

^ Estimated accrued interest is included for your convenience. The value represents the estimated portion of the interest that would be received upon the sale of your Fixed Income positions. For more information, see the Specific instructions and disclosures page.

Portfolio summary

CURRENT

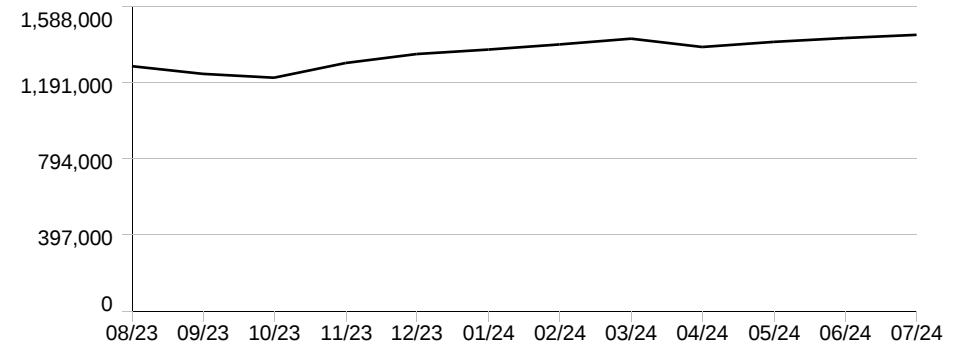


ASSETS

ASSET TYPE	PREVIOUS VALUE ON JUN 30	%	CURRENT VALUE ON JUL 31	%	ESTIMATED ANN. INCOME
Cash and sweep balances	1,294.28	0.09	1,294.55	0.09	3
Stocks, options & ETFs	179,945.71	12.64	179,231.96	12.44	1,531
Fixed income securities	59,793.60	4.20	59,876.40	4.16	2,580
Mutual funds	388,512.92	27.29	402,182.42	27.92	4,178
Annuities/insurance #	794,080.64	55.78	798,053.13	55.40	0
Asset value	\$1,423,627.15	100%	\$1,440,638.46	100%	\$8,292

Certain assets in this category may not be held in your account. None of the positions are protected by SIPC. If you no longer own any of these investments, please tell us so we can update this section. For important additional information please refer to the disclosures contained in this statement.

Value over time



SNAPSHOT

RAJESH BHATIA
& SHEELA SATPUTE JT WROS

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1557-4741

Cash flow summary

	THIS PERIOD	THIS YEAR
Opening value of cash and sweep balances	\$1,294.28	
Income and distributions	5,644.14	8,299.79
Net additions to cash	\$5,644.14	\$8,299.79
Securities purchased	-5,643.87	-7,005.27
Net subtractions from cash	-\$5,643.87	-\$7,005.27
Closing value of cash and sweep balances	\$1,294.55	

Income summary *

	THIS PERIOD	THIS YEAR
TAXABLE Money market/sweep funds	0.27	0.99
Interest	0.00	1,293.53
Ordinary dividends and ST capital gains	353.66	1,223.95
Qualified dividends	0.00	491.11
Long term capital gains	5,290.21	5,290.21
Total taxable income	\$5,644.14	\$8,299.79
Total federally tax-exempt income	\$0.00	\$0.00
Total income	\$5,644.14	\$8,299.79

* Certain distributions made in the current year are reported as prior year income according to IRS regulations. This may cause a difference between Cash Flow and Income Summary totals.



Advisors

SNAPSHOT

Page 3 of 10

RAJESH BHATIA
& SHEELA SATPUTE JT WROS

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1557-4741

Your Financial Advisor

SEAN CHATMAN
Phone: 866-636-8339

301 UNIVERSITY AVE
PALO ALTO, CA 94301

Account profile

Full account name:	RAJESH BHATIA & SHEELA SATPUTE JT WROS
Account type:	Standard Brokerage
Brokerage account number:	1557-4741
Tax status:	Taxable
Investment objective/Risk tolerance:*	MODERATE GROWTH
Time horizon:*	LONG TERM (10+ YEARS)
Liquidity needs:*	NONE
Cost Basis Election:	First in, First out
Sweep option:	STANDARD BANK DEPOSIT

*For more information, please visit us at: www.wellsfargoadvisors.com/disclosures

Client service information

Client service:	866-281-7436
Website:	www.wellsfargoadvisors.com

For your consideration

Go paperless. Accessing your account documents online is easy, secure, and costs nothing. Sign on at wellsfargoadvisors.com, go to **Portfolio** and select **Statements & Docs**, and then click on the **Delivery Preferences** link. Choose **Paperless - All Docs** or view your Delivery Settings details to select specific account documents for paperless delivery. If you do not have a Username and Password, visit wellsfargoadvisors.com/signup or call 1-877-879-2495 for enrollment assistance.

Document delivery status

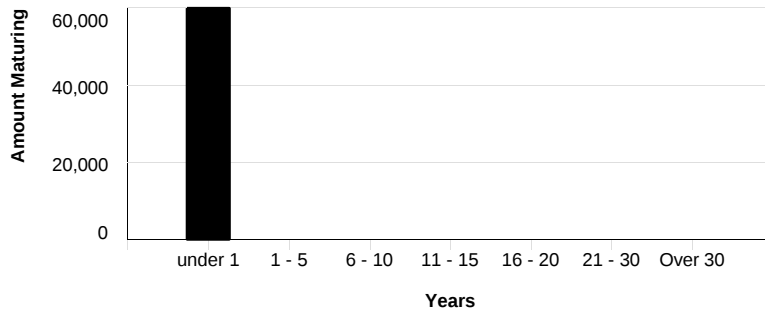
Email Address: BHATIA_RAJESH@YAHOO.COM

	Paper	Electronic
Statements:		X
Trade confirmations:		X
Tax documents:		X
Shareholder communications:		X
Other documents:		X

**RAJESH BHATIA
& SHEELA SATPUTE JT WROS**

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1557-4741

Bond maturity schedule



MATURING IN:	AMOUNT MATURING	CURRENT VALUE	% OF MATURING VALUE
under 1 year	60,000.00	59,876.40	100.00
1 to 5 years	0.00	0.00	0.00
6 to 10 years	0.00	0.00	0.00
11 to 15 years	0.00	0.00	0.00
16 to 20 years	0.00	0.00	0.00
21 to 30 years	0.00	0.00	0.00
over 30 years	0.00	0.00	0.00
Total	\$60,000.00	\$59,876.40	100.00%

Portfolio detail

Cash and Sweep Balances

Sweep Balances - You have the right, in the course of normal business operations, to withdraw balances in the Bank Deposit Sweep Program(s) or redeem shares of the money market mutual fund used in the sweep, subject to any open commitments in any of your accounts and have the proceeds returned to your accounts or remitted to you. The money market mutual funds in the sweep reserve the right to require one or more day's prior notice before permitting withdrawals.

Standard Bank Deposit Sweep - Consists of monies generally first held at Wells Fargo Bank, N.A. and (if amounts exceed \$250,000) at one or more Wells Fargo affiliated banks.

Expanded Bank Deposit Sweep - Consists of monies held at Wells Fargo Bank, N.A. unless indicated otherwise on our public website and (if amounts exceed \$250,000) at one or more Wells Fargo affiliated or nonaffiliated banks.

Brokered Liquid Deposit - Consists of monies held at one or more program bank(s), as described in the Brokered Liquid Deposit Disclosure.

Assets in the Bank Deposit Sweep Program and Brokered Liquid Deposit are not covered by SIPC, but are instead eligible for FDIC insurance of up to \$250,000 per depositor, per institution, in accordance with FDIC rules. For additional information, please contact Your Financial Advisor.

DESCRIPTION	% OF ACCOUNT	ANNUAL PERCENTAGE YIELD EARNED*	CURRENT MARKET VALUE	ESTIMATED ANNUAL INCOME
STANDARD BANK DEPOSIT	0.09	0.246	1,294.55	3.00
Interest Period 07/01/24 - 07/31/24				
Total Cash and Sweep Balances	0.09		\$1,294.55	\$3.00

* APYE measures the total amount of the interest paid on an account based on the interest rate and the frequency of the compounding during the interest period. The annual percentage yield earned is expressed as an annualized rate, based on a 365 day year.



RAJESH BHATIA
& SHEELA SATPUTE JT WROS

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1557-4741

Bank Deposit Allocation

Monies on deposit at each bank are eligible for FDIC insurance of up to \$250,000 per depositor, per bank in accordance with FDIC rules. In those instances where deposit balances exceed the maximum FDIC insurance limits, those deposits will be uninsured. Deposits at each bank are not held in your securities brokerage account and therefore not covered by SIPC. Settlement timing differences will cause balances displayed in this section to vary from those indicated in the Portfolio detail section due to activity that occurs after 2pm ET on the last business day of the month. For additional information, please contact Your Financial Advisor.

DESCRIPTION	FDIC CERT NUMBER	CURRENT VALUE	AS OF VALUE DATE
WELLS FARGO BANK, N.A.	3511	1,294.55	07/31
Total Bank Deposits		\$1,294.55	

Stocks, options & ETFs

Stocks and ETFs

DESCRIPTION	% OF ACCOUNT	QUANTITY	CURRENT PRICE	CURRENT MARKET VALUE	ESTIMATED	
					ANNUAL INCOME	ANNUAL YIELD (%)
ISHARES ETF GLOBAL COMM SERVICES IXP On Reinvestment	3.61	597.22100	87.1900	52,071.69	546	1.04
MICROSOFT CORP MSFT On Reinvestment	1.12	38.52100	418.3500	16,115.26	116	0.71
VISA INC CLASS A V On Reinvestment	7.71	417.98100	265.6700	111,045.01	869	0.78
Total Stocks and ETFs	12.44			\$179,231.96	\$1,531	0.85
Total Stocks, options & ETFs	12.44			\$179,231.96	\$1,531	0.85

**RAJESH BHATIA
& SHEELA SATPUTE JT WROS**

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1557-4741

Fixed Income Securities

Corporate and municipal bonds and other fixed income securities are priced by a computerized pricing service or, for less actively traded issues, by utilizing a yield-based matrix system to arrive at an estimated market value.

Certificates of Deposit

Long-term certificates of deposit (maturity beyond one year from date of issue) are priced using a market value pricing model.

DESCRIPTION	% OF ACCOUNT	QUANTITY	CURRENT PRICE	CURRENT MARKET VALUE	ESTIMATED		
					ACCRUED INTEREST	ANNUAL INCOME	ANNUAL YIELD (%)
SYNCHRONY BANK CD DRAPER UT ACT/365 FDIC INSD CPN 4.300% DUE 10/07/24 DTD 10/07/22 FC 04/07/23 CUSIP 87165HT91	4.16	60,000	99.7940	59,876.40	819.95	2,580	4.30
Total Certificates of Deposit	4.16	60,000		\$59,876.40	\$819.95	\$2,580	4.31
Total Fixed Income Securities	4.16			\$59,876.40	\$819.95	\$2,580	4.31

Mutual Funds

Open End Mutual Funds

Open End Mutual Fund shares are priced at net asset value. Estimated Annual Income and Yield refer to Dividends and Interest Income only, and typically do not reflect Total return.

DESCRIPTION	% OF ACCOUNT	QUANTITY	CURRENT PRICE	CURRENT MARKET VALUE	ESTIMATED	
					ANNUAL INCOME	ANNUAL YIELD (%)
BLACKROCK HEALTH SCIENCES OPP PORT CL A SHSAX On Reinvestment	10.75	2,199.68200	70.4100	154,879.60	376	0.24
EATON VANCE DIVIDEND BUILDER FUND CLASS A EVTMX On Reinvestment	1.26	1,112.91000	16.3100	18,151.56	285	1.56
HARTFORD MUT FDS INC CAP APPREC FD CL A ITHAX On Reinvestment	3.00	976.43200	44.2600	43,216.88	202	0.46



Advisors

RAJESH BHATIA
& SHEELA SATPUTE JT WROS

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1557-4741

Mutual Funds

Open End Mutual Funds continued

DESCRIPTION	% OF ACCOUNT	QUANTITY	CURRENT PRICE	CURRENT MARKET VALUE	ESTIMATED	
					ANNUAL INCOME	ANNUAL YIELD (%)
MFS UTILITIES FUND CLASS A MMUFX On Reinvestment	1.80	1,149.60600	22.6000	25,981.09	523	2.01
DAVIS FINANCIAL FUND CL A RPFGX On Reinvestment	4.42	1,048.46300	60.6800	63,620.73	1,059	1.66
PUTNAM FOCUSED EQUITY FUND CLASS A PGIAX On Reinvestment	0.92	384.12100	34.4100	13,217.60	N/A	N/A
PUTNAM INTL EQUITY FD CL A POVSX On Reinvestment	2.59	1,372.18500	27.2400	37,378.31	646	1.72
VOYA GLOBAL HIGH DIV LOW VOLATILITY FUND CLASS A NAWGX On Reinvestment	3.17	1,011.87300	45.2000	45,736.65	1,086	2.37
Total Open End Mutual Funds	27.92			\$402,182.42	\$4,178	1.04
Total Mutual Funds	27.92			\$402,182.42	\$4,178	1.04

**RAJESH BHATIA
& SHEELA SATPUTE JT WROS**

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1557-4741

Annuities/Insurance

These positions are not held in your account and are not protected by SIPC. These positions are held directly by the issuing insurance company and are shown for informational purposes only. Annuity and insurance information is provided directly from the insurance companies. Accuracy is not guaranteed and surrender charges may apply. IRA holders will receive a separate IRS Form 5498/FMV Statement in compliance with IRS requirements. Total premium(s) represents the gross amount of premiums made since the contract issue date and is not reduced by any withdrawals. Elected benefit rider information may not be available from all insurance companies. Verify contract and rider information prior to taking action on your contract as values may have changed. Please contact Your Financial Advisor should you have any questions about the contracts you own.

Variable Annuities

DESCRIPTION	% OF ACCOUNT	AS OF VALUE DATE	ESTIMATED MARKET VALUE
NATIONWIDE LIFE INS ANN DESTINATION NAVIGATOR2.0 VARIABLE ANNUITY CONTR# 016849005 ISSUE DATE 4/3/18 TOTAL PREMIUM(S) \$590,000.00	45.19	07/30/24	651,048.12
Sub Funds	Units	Estimated Value	% Market Value
NW NVIT AMFDS BD II	18,444.60072	217,630.04	33.42
NWNVITMGDAMFDSASSTALOC II	12,880.41887	212,790.34	32.68
NW NVIT MGD AMFDS GRINC II	9,781.81430	220,627.74	33.88
SURRENDER VALUE (As of 07/29/24)		621,172.64	
ELECTED BENEFIT(S) (As of 07/29/24)			
NW INCOME CAPTURE			
PROTECTED BENEFIT BASE		722,108.08	
TOTAL CONTRACT YR W/D AMT		24,190.62	
REMAINING W/D AMT		24,190.62	
DEATH BENEFIT		651,550.28	
DEATH BEN STANDARD			
Total Variable Annuities	45.19		\$651,048.12

Fixed Annuities

DESCRIPTION	% OF ACCOUNT	AS OF VALUE DATE	ESTIMATED MARKET VALUE
FORETHOUGHT LIFE INS CO INS PRODS SNGL PREM DEFFERRED FXD 5 YR ANN CONTR# 555112069 ISSUE DATE 10/24/18 TOTAL PREMIUM(S) \$20,000.00	1.65	07/30/24	23,789.46
Sub Funds	Units	Estimated Value	% Market Value
5 YR FIXED ANNUITY	0.00000	23,789.46	100.00



Advisors

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& SHEELA SATPUTE JT WROS

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1557-4741

Annuities/Insurance continued

Fixed Annuities

DESCRIPTION	% OF ACCOUNT	AS OF VALUE DATE	ESTIMATED MARKET VALUE
SYMETRA LIFE INSURANCE CO SELECT MAX 5 FIXED ANNUITY CONTR# F5SM019111 ISSUE DATE 9/15/23 TOTAL PREMIUM(S) \$117,745.84	8.55	07/30/24	123,215.55
Sub Funds SELECT MAX 5-YEAR FIXED ACCOUN	Units 0.00000	Estimated Value 123,215.55	% Market Value 100.00
Total Fixed Annuities	10.20		\$147,005.01
Total Annuities/Insurance	55.40		\$798,053.13

Activity detail

DATE	ACCOUNT TYPE	TRANSACTION/ CHECK NUMBER	QUANTITY	DESCRIPTION	PRICE	AMOUNT	CASH AND SWEEP BALANCES
07/01				BEGINNING BALANCE			1,294.28
07/02	Cash	DIVIDEND		VOYA GLOBAL HIGH DIV LOW VOLATILITY FUND CLASS A 070124 1,003.73100 AS OF 7/01/24		347.99	
07/02	Cash	REINVEST DIV	8.14200	VOYA GLOBAL HIGH DIV LOW VOLATILITY FUND CLASS A REINVEST AT 42.740		-347.99	1,294.28
07/10	Cash	DIVIDEND		EATON VANCE DIVIDEND BUILDER FUND CLASS A 070924 1,112.55100 AS OF 7/09/24		5.67	
07/10	Cash	REINVEST DIV	0.35900	EATON VANCE DIVIDEND BUILDER FUND CLASS A REINVEST AT 15.790		-5.67	1,294.28

RAJESH BHATIA
& SHEELA SATPUTE JT WROS

JULY 1, 2024 - JULY 31, 2024
ACCOUNT NUMBER: 1557-4741

Activity detail continued

DATE	ACCOUNT TYPE	TRANSACTION/ CHECK NUMBER	QUANTITY	DESCRIPTION	PRICE	AMOUNT	CASH AND SWEEP BALANCES
07/19	Cash	LT CAP GAIN		BLACKROCK HEALTH SCIENCES OPP PORT CL A 071824 2,123.43200 AS OF 7/18/24		5,290.21	
07/19	Cash	REINVESTMENT	76.25000	BLACKROCK HEALTH SCIENCES OPP PORT CL A REINVEST AT 69.380		-5,290.21	
07/31	Cash	INTEREST		STANDARD BANK DEPOSIT 073124 1,294		0.27	1,294.28 1,294.55

Cash sweep activity

Our Cash Sweep program allows you to earn a return on the idle cash balances in your account by automatically investing such balances into one of our cash sweep options. These 'sweep transactions' may represent a net amount for the day and occur on settlement date. The following section displays transfers into and out of your sweep option. Transactions displayed here are Transfer To, Transfer From and Reinvested Dividends and Interest. These transaction amounts are not included in your cash flow summary.

DATE	TRANSACTION	DESCRIPTION	AMOUNT	DATE	TRANSACTION	DESCRIPTION	AMOUNT
07/01		BEGINNING BALANCE	1,294.28	07/31		ENDING BALANCE	1,294.55
07/31	REINVEST INT	STANDARD BANK DEPOSIT	0.27				