

Qualified Dividends and Capital

Gain Tax Worksheet

Section A: Personal Information

- Name: _____
- Social Security Number: _____
- Filing Status: (Circle one) Single / Married Filing Jointly / Married Filing Separately / Head of Household

Section B: Income Details

1. Total Income: \$_____
Include wages, salaries, bonuses, etc.
2. Qualified Dividends: \$_____
List only the dividends eligible for lower tax rates.
3. Net Capital Gain: \$_____
Include gains from the sale of assets held for more than one year.

Section C: Tax Calculation

4. Adjusted Gross Income (AGI): \$_____
• Calculate by summing up all income and subtracting adjustments.
5. Taxable Income: \$_____
◦ Subtract deductions (standard or itemized) from AGI.
6. Tax on Qualified Dividends and Capital Gains:
 - At 0% Rate: \$_____ (if applicable)
 - At 15% Rate: \$_____
 - At 20% Rate: \$_____

Section D: Total Tax Due

7. Total Tax from Qualified Dividends and Capital Gains: \$_____
• Add the taxes calculated at different rates.
8. Total Tax Liability: \$_____
• Combine the total tax from dividends and gains with your other tax liabilities (if any).