

Qualified Dividends and Capital Gain Tax Worksheet

Section A: Taxpayer Information

- Name: _____
- SSN: _____
- Filing Status: [] Single [] MFJ [] MFS [] HoH

Section B: Income Details

1. Total Income: \$ _____
2. Qualified Dividends: \$ _____
3. Net Capital Gain: \$ _____

Section C: Tax Calculations

4. AGI (Adjusted Gross Income): \$ _____
5. Taxable Income (after deductions): \$ _____
6. Base Tax (from tax tables): \$ _____
7. Tax on Qualified Dividends & Capital Gains:
 - 0% Rate: \$ _____
 - 15% Rate: \$ _____
 - 20% Rate: \$ _____
8. Total Tax Due (Sum of Base Tax and Tax on Investments): \$ _____

Section D: Signature

Taxpayer's Signature: _____ Date: _____