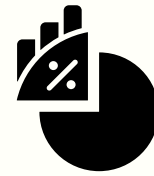


Qualified Dividends and Capital Gain Tax Worksheet



Personal Information

- Name:
- Social Security Number:
- Filing Status: [Single/Married Filing Jointly/Married Filing Separately/Head of Household]

Income Details

4. Total Income: \$ _____ 5. Qualified Dividends:
\$ _____ 6. Net Capital Gain: \$ _____

Tax Calculation

7. Adjusted Gross Income (AGI): \$ _____

- Include all income sources, adjusting for deductions and exemptions.

8. Taxable Income: \$ _____

- Calculate by deducting standard or itemized deductions from AGI.

9. Base Tax Amount: \$ _____

- Use IRS tax tables to find the base tax on your taxable income excluding qualified dividends and net capital gains.

10. Calculate the taxable amount of qualified dividends and net capital gain at 0%, 15%, or 20%:

- Amount at 0% tax rate: \$ _____
- Amount at 15% tax rate: \$ _____
- Amount at 20% tax rate: \$ _____

Total Tax Due

11. Total Qualified Dividends and Capital Gain Tax:

\$ _____ - Sum of tax calculated at different rates.

12. Total Tax Liability: \$ _____

- Sum of base tax amount and total qualified dividends and capital gain tax.