

Qualified Dividends & Capital Gain Tax Worksheet

Income Summary

1. Total Income Reported - Enter your total income: \$ _____
2. Qualified Dividends - Enter total qualified dividends: \$ _____
3. Net Capital Gain - Enter total net capital gain: \$ _____

Detailed Calculations

1. Adjusted Gross Income (AGI) - Enter your adjusted gross income:
\$ _____
2. Taxable Income - Calculate your taxable income:
 - Adjusted Gross Income: \$ _____
 - Less: Deductions (Standard/Itemized): \$ _____
 - Taxable Income: \$ _____
3. Base Tax Calculation - Use tax tables to find the tax on income excluding dividends and gains:
 - Tax on regular income: \$ _____
 - Add: Tax on Qualified Dividends and Capital Gains:
 - At 0%: \$ _____
 - At 15%: \$ _____
 - At 20%: \$ _____
 - Total Tax from Qualified Dividends and Capital Gains:
\$ _____
4. Total Tax Due
 - Base Tax + Tax from Qualified Dividends and Capital Gains = Total Tax Due: \$ _____

Certification

- Taxpayer's Signature: _____ Date: _____
- Preparer's Signature (if applicable): _____ Date: _____
