

# Qualified Dividends and Capital Gain Tax Worksheet

## Section 1: Taxpayer Information

- Taxpayer Name: \_\_\_\_\_
- Social Security Number:  
\_\_\_\_\_
- Filing Status: Single, Married Filing Jointly,  
Married Filing Separately, Head of  
Household

## Section 3: Adjusted Gross Income

- Calculate Adjusted Gross Income (AGI)
  - Enter all income, including dividends and gains: \$ \_\_\_\_\_
  - Subtract adjustments (e.g., IRA contributions, student loan interest):  
\$ \_\_\_\_\_
  - Adjusted Gross Income:  
\$ \_\_\_\_\_

## Section 5: Total Tax Liability

- Total Tax Due
  - Add Base Tax on Regular Income (from line 5) and Total Tax from Investments (from line 6):
  - Total Tax Due: \$ \_\_\_\_\_

## Section 2: Income Reporting

- Total Income for the Year
  - Enter your total income:  
\$ \_\_\_\_\_
- Qualified Dividends
  - Enter the amount of qualified dividends:  
\$ \_\_\_\_\_
- Total Net Capital Gain
  - Enter your total net capital gain:  
\$ \_\_\_\_\_

## Section 4: Tax Calculation on

### Investments

- Base Tax on Regular Income
  - Use applicable tax tables to calculate tax on AGI excluding dividends and gains: \$ \_\_\_\_\_
- Tax on Qualified Dividends and Capital Gains
  - Calculate the tax on qualified dividends and capital gains using the rates 0%, 15%, or 20% based on your taxable income:
    - At 0% Rate: \$ \_\_\_\_\_
    - At 15% Rate: \$ \_\_\_\_\_
    - At 20% Rate: \$ \_\_\_\_\_
  - Total Tax from Investments:  
\$ \_\_\_\_\_