

# Qualified Dividends and Capital Gain Tax Worksheet

## Section A: Income Details

- Total Income: \$ \_\_\_\_\_
  - Include wages, salaries, interest, rentals, etc.
- Qualified Dividends: \$ \_\_\_\_\_
  - List dividends that are considered qualified for preferential tax treatment.
- Net Capital Gain: \$ \_\_\_\_\_
  - Include gains from assets held for more than a year.

## Section B: Tax Calculations

- Adjusted Gross Income (AGI): \$ \_\_\_\_\_
- Taxable Income: \$ \_\_\_\_\_

## Section C: Applying Tax Rates

- Tax on Regular Income (using tax brackets): \$ \_\_\_\_\_
- Tax on Qualified Dividends:
  - At 0% Rate: \$ \_\_\_\_\_ (if applicable based on taxable income)
  - At 15% Rate: \$ \_\_\_\_\_
  - At 20% Rate: \$ \_\_\_\_\_
- Tax on Net Capital Gains:
  - At 0% Rate: \$ \_\_\_\_\_ (if applicable based on taxable income)
  - At 15% Rate: \$ \_\_\_\_\_
  - At 20% Rate: \$ \_\_\_\_\_

## Section D: Total Tax Due

- Total Tax from Investments: \$ \_\_\_\_\_
  - Sum the taxes from qualified dividends and capital gains.
- Total Tax Due: \$ \_\_\_\_\_
  - Add the base tax and the total tax from investments.