

Qualified Dividends and Capital Gain Tax Worksheet

Section A: Taxpayer Information

- Name:

- Social Security Number:

- Filing Status: ___ Single ___
Married Filing Jointly ___
Married Filing Separately ___
Head of Household

Section B: Income Details

- Total Income: \$ _____
- Qualified Dividends:
\$ _____
- Net Capital Gain:
\$ _____

Section C: Tax Calculations

- Adjusted Gross Income:
\$ _____
- Taxable Income (after
deductions): \$ _____
- Base Tax Liability (from IRS
tables): \$ _____
- Tax on Qualified Dividends:
 - At 0%: \$ _____
 - At 15%: \$ _____
 - At 20%: \$ _____
- Tax on Net Capital Gains:
 - At 0%: \$ _____
 - At 15%: \$ _____
 - At 20%: \$ _____
- Total Tax Due from Qualified
Dividends and Capital Gains:
\$ _____

Section D: Summary

- Total Tax Liability:
 - Base Tax + Tax from
Qualified Dividends and
Capital Gains:
\$ _____

Section E: Declaration

- Taxpayer's Signature:

Date: _____