

# Qualified Dividends and Capital Gain Tax Worksheet

## Personal Information

- Name: \_\_\_\_\_
- Social Security No: \_\_\_\_\_
- Filing Status: \_\_\_\_\_

## Income Details

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

## Tax Calculation

- Adjusted Gross Income (AGI): \$ \_\_\_\_\_
  - (Include all income sources, adjusting for deductions and exemptions)
- Taxable Income: \$ \_\_\_\_\_
  - (Subtract standard or itemized deductions from AGI)
- Base Tax Amount: \$ \_\_\_\_\_
  - (Use IRS tax tables to find the base tax on your taxable income excluding qualified dividends and net capital gains)
- Taxable Amount of Qualified Dividends and Net Capital Gain at Different Rates:
  - 0% Rate Amount: \$ \_\_\_\_\_
  - 15% Rate Amount: \$ \_\_\_\_\_
  - 20% Rate Amount: \$ \_\_\_\_\_

## Total Tax Due

- Total Qualified Dividends and Capital Gain Tax: \$ \_\_\_\_\_
  - (Sum of tax calculated at 0%, 15%, and 20% rates)
- Total Tax Liability: \$ \_\_\_\_\_
  - (Add base tax amount and total qualified dividends and capital gain tax)

## Signatures

- Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_
- Preparer Signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_