

Qualified Dividends and Capital Gain Tax Worksheet

Section A: Personal Information

- Name: _____
- SSN: _____ - _____ - _____
- Filing Status: Single Married Filing Jointly Married Filing Separately
 Head of Household

Section B: Income Details

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

Section C: Tax Calculation

- Standard or Itemized Deductions: \$ _____
- Taxable Income (after deductions): \$ _____
- Federal Tax on Qualified Dividends:
 - 0% Rate: \$ _____
 - 15% Rate: \$ _____
 - 20% Rate: \$ _____
- Federal Tax on Net Capital Gains:
 - 0% Rate: \$ _____
 - 15% Rate: \$ _____
 - 20% Rate: \$ _____

Section D: Tax Summary and Planning

- Overview of Tax Implications:
 - Effective Tax Rate on Investments: Calculate and display the effective tax rate applied to investment income.

Section E: Total Tax Liability

- Total Tax from Qualified Dividends and Capital Gains: \$ _____
- Total Federal Tax Due (including other income): \$ _____

Section F: Signature

- Taxpayer's Signature: _____ Date: _____