

Qualified Dividends and Capital Gain Tax Worksheet

Section A: Personal Information

- Name: _____
- SSN: _____

Section B: Income Details

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

Section C: Tax Calculations

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

Section D: Tax on Investments

- Calculate Tax on Qualified Dividends:
 - At 0% Rate: \$_____, At 15% Rate: \$_____, At 20% Rate: \$_____
- Calculate Tax on Net Capital Gains:
 - At 0% Rate: \$_____, At 15% Rate: \$_____, At 20% Rate: \$_____

Section E: Summary of Tax Due

- Total Tax from Investments: \$_____
- Total Tax Due: \$_____