



Qualified Dividends and Capital Gain Tax Worksheet

Section A: Estate Information

- Estate of (Decedent's Name): _____
- Executor's Name: _____
- Executor's SSN or TIN: _____
- Estate's TIN: _____

Section B: Estate Income Details

- Total Income of the Estate: \$_____
 - Include all estate income sources like rents, business income, etc.
- Qualified Dividends from Estate Investments: \$_____
- Net Capital Gains from Estate Assets: \$_____
 - From sales of stocks, bonds, real estate, etc.

Section C: Deductions and Adjusted Gross Income

- Deductions (Legal fees, executor fees, etc.): \$_____
- Adjusted Gross Income (AGI):
 - Total Income minus Deductions: \$_____

Section D: Calculating Taxable Income

- Taxable Income:
 - AGI minus any applicable estate tax deductions: \$_____

Section E: Tax Calculation

- Tax on Regular Income: \$_____
 - Based on IRS tax tables or estate tax rates.
- Tax on Qualified Dividends and Capital Gains:
 - Qualified Dividends:
 - At 0%, 15%, or 20% rate depending on the income brackets: \$_____
 - Net Capital Gains:
 - If long-term, taxed at 0%, 15%, or 20%: \$_____
 - If short-term, taxed at regular estate income tax rates: \$_____

Section F: Total Estate Tax Liability

- Total Tax from Regular Income and Investments: \$_____
 - Sum of all applicable taxes.