

QUALIFIED DIVIDENDS AND CAPITAL GAIN TAX WORKSHEET

Section A: Income Details

- Total Earned Income (from freelancing): \$ _____
- Qualified Dividends: \$ _____
 - From stocks or mutual funds.
- Net Capital Gains: \$ _____
 - From sales of stocks, bonds, or other capital assets.

Section B: Adjusted Gross Income and Deductions

- Adjusted Gross Income (AGI): \$ _____
- Standard Deduction or Itemized Deductions: \$ _____
- Taxable Income: \$ _____

Section C: Tax Calculation

- Tax on Earned Income (from IRS tax table):
\$ _____
- Tax on Qualified Dividends and Capital Gains:
 - At 0% Rate (if applicable): \$ _____
 - At 15% Rate: \$ _____
 - At 20% Rate: \$ _____
- Self-Employment Tax: \$ _____
 - Calculate this on earned income if not incorporated.

Section F: Total Tax Liability

- Total Tax from Earned Income and Self-Employment:
\$ _____
- Total Tax from Investments: \$ _____
- Total Tax Due: \$ _____
 - Add all tax amounts together.

Section E: Signature and Declaration

- Taxpayer's Signature: _____ Date:
