

# Qualified Dividends and Capital Gain Tax Worksheet

## Income and Investment Details

- Total U.S. Source Income (Including real estate, stocks, etc.):  
\$ \_\_\_\_\_
- Qualified Dividends (from U.S. corporations or qualified foreign corporations): \$ \_\_\_\_\_
- Net Capital Gains (from U.S. securities, real estate, etc.): \$ \_\_\_\_\_
- Short-term Capital Gains: \$ \_\_\_\_\_ (Taxed at ordinary income rates)
- Long-term Capital Gains: \$ \_\_\_\_\_ (Eligible for preferential rates)

## Tax Liability Calculation

- Adjusted Gross Income from U.S. Sources: \$ \_\_\_\_\_
  - Calculate by adding all U.S.-sourced income.
- Taxable Income from U.S. Sources: \$ \_\_\_\_\_
  - Depending on treaty benefits, may differ from standard U.S. tax calculations.

## Tax Calculation on Investment Income

- Tax on Qualified Dividends:
  - Typically at 30% or Treaty Rate: \$ \_\_\_\_\_
- Tax on Net Capital Gains:
  - Short-term Gains: \$ \_\_\_\_\_ (Taxed at ordinary rates up to 30%)
  - Long-term Gains:
    - At 0% Rate: \$ \_\_\_\_\_ (if applicable under treaty)
    - At 15% Rate: \$ \_\_\_\_\_ (or lower treaty rate)
    - At 20% Rate: \$ \_\_\_\_\_ (if applicable)

## Total Tax Due

- Total Tax from U.S. Source Investments: \$ \_\_\_\_\_
- Total U.S. Tax Liability: \$ \_\_\_\_\_