

# Qualified Dividends and Capital Gain Tax Worksheet

## Section A: Personal Information

- Name: \_\_\_\_\_
- SSN: \_\_\_\_\_

## Section B: Income Details

- Total Income (Include all sources): \$ \_\_\_\_\_
- Qualified Dividends (from 1099-DIV): \$ \_\_\_\_\_
- Net Long-Term Capital Gains (from Schedule D):  
\$ \_\_\_\_\_

## Section C: Adjusted Gross Income

- Adjusted Gross Income (AGI) (Subtract any specific adjustments): \$ \_\_\_\_\_

## Section D: Taxable Income Calculation

- Taxable Income (Subtract the higher of standard or itemized deductions from AGI): \$ \_\_\_\_\_

## Section E: Tax Calculations

- Base Tax Liability (Using the IRS tax tables or tax software): \$ \_\_\_\_\_
- Tax on Qualified Dividends:
  - At 0% Rate (if applicable): \$ \_\_\_\_\_
  - At 15% Rate: \$ \_\_\_\_\_
  - At 20% Rate: \$ \_\_\_\_\_
- Tax on Net Long-Term Capital Gains:
  - At 0% Rate (if applicable): \$ \_\_\_\_\_
  - At 15% Rate: \$ \_\_\_\_\_
  - At 20% Rate: \$ \_\_\_\_\_

## Section F: Total Tax Due

- Total Tax from Qualified Dividends and Capital Gains:  
\$ \_\_\_\_\_
  - Sum of taxes calculated for dividends and gains.
- Total Tax Due: \$ \_\_\_\_\_
  - Sum of base tax liability and total tax from investments.

## Section G: Declaration

- Taxpayer's Signature: \_\_\_\_\_ Date: \_\_\_\_\_