

# Qualified Dividends and Capital Gain Tax Worksheet

## Section A: Income Details

- Total Income: \$ \_\_\_\_\_
  - Include pensions, Social Security benefits, interest, and other incomes.
- Qualified Dividends: \$ \_\_\_\_\_
  - These dividends qualify for preferential tax treatment.
- Net Capital Gains: \$ \_\_\_\_\_
  - Include gains from assets held for more than a year, typically from stocks or real estate.

## Section B: Tax Calculations

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

## Section C: Tax on Investments

- Tax on Qualified Dividends:
  - At 0% Rate: \$ \_\_\_\_\_ (if applicable)
  - At 15% Rate: \$ \_\_\_\_\_
  - At 20% Rate: \$ \_\_\_\_\_
- Tax on Net Capital Gains:
  - At 0% Rate: \$ \_\_\_\_\_ (if applicable)
  - At 15% Rate: \$ \_\_\_\_\_
  - At 20% Rate: \$ \_\_\_\_\_

## Section D: Summary of Tax Due

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

## Section E: Signature

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