

# Qualified Dividends and Capital Gain Tax Worksheet

## Section A: Investment Income Details

- Total Income (Including investments): \$ \_\_\_\_\_
- Qualified Dividends: \$ \_\_\_\_\_
- Net Capital Gains: \$ \_\_\_\_\_
  - Long-term gains subject to preferential rates.

## Section B: Deductions and Adjustments

- Standard or Itemized Deductions: \$ \_\_\_\_\_
- Other Adjustments (IRA, HSA, etc.): \$ \_\_\_\_\_
- Adjusted Gross Income (AGI): \$ \_\_\_\_\_

## Section C: Tax Calculation

- Taxable Income: \$ \_\_\_\_\_
- Federal Tax on Ordinary Income: \$ \_\_\_\_\_
- Tax on Qualified Dividends:
  - 0% Rate: \$ \_\_\_\_\_
  - 15% Rate: \$ \_\_\_\_\_
  - 20% Rate: \$ \_\_\_\_\_
- Tax on Net Capital Gains:
  - 0% Rate: \$ \_\_\_\_\_
  - 15% Rate: \$ \_\_\_\_\_
  - 20% Rate: \$ \_\_\_\_\_

## Section D: Total Tax Summary

- Total Federal Tax Due: \$ \_\_\_\_\_
  - Include taxes from ordinary income and investments.
- Total State Tax Due (if applicable): \$ \_\_\_\_\_
- Combined Total Tax Due: \$ \_\_\_\_\_
  - Sum of federal and state taxes.

## Section E: Additional Notes and Recommendations

- Tax Planning Opportunities:
  - Strategies for future investments and tax-saving options.