

# Qualified Dividends and Capital Gain Tax Worksheet

## Income and Investment Details

- Total Income (Including wages, business income, etc.): \$ \_\_\_\_\_
- Qualified Dividends (from U.S. corporations or qualified foreign entities): \$ \_\_\_\_\_
- Net Capital Gains (short-term and long-term): \$ \_\_\_\_\_
  - Short-term Gains: \$ \_\_\_\_\_
  - Long-term Gains: \$ \_\_\_\_\_

## Advanced Tax Calculation

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

## Detailed Tax Liability on Investments

- Tax on Qualified Dividends:
  - At 0% Rate: \$ \_\_\_\_\_
  - At 15% Rate: \$ \_\_\_\_\_
  - At 20% Rate: \$ \_\_\_\_\_
- Tax on Net Capital Gains:
  - Short-term (Taxed at ordinary rates): \$ \_\_\_\_\_
  - Long-term:
    - At 0% Rate: \$ \_\_\_\_\_
    - At 15% Rate: \$ \_\_\_\_\_
    - At 20% Rate: \$ \_\_\_\_\_

## Legal Considerations

- Potential Tax Issues Identified: \_\_\_\_\_
- Tax Planning Opportunities: \_\_\_\_\_

## Summary of Tax Liability

- Total Tax from Investments: \$ \_\_\_\_\_
- Overall Federal Tax Liability: \$ \_\_\_\_\_