

Qualified Dividends and Capital Gain Tax Worksheet

Section A: Client Information

- Client Name: _____
- Filing Status: Single Married Filing Jointly Married Filing Separately Head of Household

Section B: Investment Income Details

- Total Income: \$_____
 - Include: wages, interest, dividends, etc.
- Qualified Dividends: \$_____
- Net Capital Gains: \$_____ **Complete**

Section C: Calculation of Taxable Income

- Standard or Itemized Deductions: \$_____
- Taxable Income (after deductions): \$_____

Section D: Federal Tax Calculation

- Tax Rates for Qualified Dividends:
 - 0% on \$_____
 - 15% on \$_____
 - 20% on \$_____

Section E: Total Tax Due

- Total Tax from Qualified Dividends and Capital Gains: \$_____
- Overall Total Tax Due: \$_____

Section F: Signature and Date

- Tax Consultant's Signature: _____ Date: _____