

Qualified Dividends and Capital Gain Tax Worksheet

Section A: Organization Information

- Organization Name:

- EIN (Employer Identification Number):

- Type of Organization: 501(c)(3) 501(c)(6) Other:

Section B: Investment Income Details

- Total Investment Income: \$ _____
 - Include dividends, interest, rents, and capital gains.
- Qualified Dividends: \$ _____
- Net Capital Gains: \$ _____

Section C: Tax Calculation (If Applicable)

- Taxable Income (from investments not related to exempt purposes): \$ _____
- Federal Tax on Qualified Dividends:
 - At 0% Rate: \$ _____ (if applicable)
 - At 15% Rate: \$ _____
 - At 20% Rate: \$ _____
- Federal Tax on Net Capital Gains:
 - At 0% Rate: \$ _____ (if applicable)
 - At 15% Rate: \$ _____
 - At 20% Rate: \$ _____

Section D: Total Tax Liability

- Total Tax from Investments: \$ _____
 - Sum of taxes from qualified dividends and capital gains.
- Total Tax Due: \$ _____

Section E: Declaration and Signature

- Preparer's Signature: _____ Date:

- Authorized Official's Signature:

----- Date: _____