

Qualified Dividends and Capital Gain Tax Worksheet

Section A: Taxpayer Information

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

Section B: Income Details

1. Total Income: \$_____
 - Including: Wages, interest, other income.
2. Qualified Dividends: \$_____
3. Net Capital Gains: \$_____

Section C: Calculation of AGI and Taxable Income

4. Adjusted Gross Income (AGI): \$_____
 - Calculation: Total Income - Adjustments.
5. Taxable Income: \$_____
 - Calculation: AGI - Deductions (Standard/Itemized).

Section D: Tax Computation

6. Base Tax Liability: \$_____
 - Using IRS tables
7. Tax on Qualified Dividends & Capital Gains:
 - 0% Rate: \$_____
 - 15% Rate: \$_____
 - 20% Rate: \$_____
8. Total Tax from Investments: \$_____
 - Sum of the above rates.

Section E: Total Tax Due

9. Total Tax Due: \$_____
Base Tax + Investment Tax