

Qualified Dividends and Capital Gain Tax Worksheet

Section A: Entity Information

- Name of Trust or Estate: _____
- EIN (Employer Identification Number):

- Filing Status: [] Trust [] Estate

Section B: Income Details

- Total Income: \$ _____
 - Include all income sources such as rents, business income, interest, and dividends.
- Qualified Dividends: \$ _____
- Net Capital Gains: \$ _____

Section C: Deductions and Exemptions

- Deductions for Distributions to Beneficiaries: \$ _____
- Administrative Expenses: \$ _____

Section D: Tax Calculation

- Taxable Income (after deductions and exemptions): \$ _____
- 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 E: Total Tax Liability

- Total Tax from Qualified Dividends and Capital Gains:
\$ _____
- Other Taxable Income Tax: \$ _____
 - Calculate the tax on other taxable income using the appropriate trust or estate tax rates.
- Total Federal Tax Due: \$ _____

Section F: Declaration and Signature

- Preparer's Signature: _____ Date: _____
- Trustee or Executor's Signature: _____ Date: _____