

# Qualified Dividends and Capital Gain Tax Worksheet

## Section A: Income and Investments

- Total Earned Income (from jobs, gigs): \$ \_\_\_\_\_
- Qualified Dividends (from stocks, mutual funds): \$ \_\_\_\_\_
- Net Long-Term Capital Gains: \$ \_\_\_\_\_

## Section B: Adjusted Gross Income

- Adjusted Gross Income (AGI):
  - Sum your earned income and investment income:  
\$ \_\_\_\_\_
  - Subtract any adjustments (e.g., student loan interest):  
\$ \_\_\_\_\_
  - Resulting AGI: \$ \_\_\_\_\_

## Section C: Calculating Taxable Income

- Standard Deduction or Itemized Deductions: \$ \_\_\_\_\_
- Taxable Income:
  - AGI minus Deductions: \$ \_\_\_\_\_

## Section D: Tax Calculation on Investments

- Tax on Qualified Dividends:
  - At 0% Rate: \$ \_\_\_\_\_ (if applicable)
  - At 15% Rate: \$ \_\_\_\_\_
- Tax on Net Long-Term Capital Gains:
  - At 0% Rate: \$ \_\_\_\_\_ (if applicable)
  - At 15% Rate: \$ \_\_\_\_\_

## Section E: Total Tax Due

- Total Tax from Regular Income (use IRS tax tables):  
\$ \_\_\_\_\_
- Total Tax from Investments: \$ \_\_\_\_\_
- Total Tax Due:
  - Sum of Regular Income Tax and Investment Tax: \$ \_\_\_\_\_