

Qualified Dividends and Capital Gain Tax Worksheet

Section A: Personal Information

- Name: _____
- SSN: _____
- Filing Status: Single MFJ MFS HoH

Section B: Income Summary

- Total Income: \$ _____
- Qualified Dividends: \$ _____
- Net Capital Gains: \$ _____

Section C: Calculate Taxes

- Taxable Income (after deductions): \$ _____
- Base Tax (IRS table): \$ _____
- Tax on Qualified Dividends:
 - 0% \$ _____ 15% \$ _____ 20%
\$ _____
- Tax on Capital Gains:
 - 0% \$ _____ 15% \$ _____ 20% \$ _____
- Total Tax Due: \$ _____

Signature

- Taxpayer's Signature: _____ Date: _____