

Qualified Dividends and Capital Gain Tax Worksheet

Personal Information

1. Name: _____
2. Social Security Number: _____

Income Details

1. Enter Total Income from Form 1040: \$ _____
2. Enter Qualified Dividends from Form 1040: \$ _____
3. Enter Net Capital Gains from Schedule D: \$ _____

Calculation of Taxable Income

1. Subtract Standard or Itemized Deductions from Total Income: \$ _____ (Enter the result from Form 1040)
2. Calculate Adjusted Gross Income (AGI):
 - Subtract any additional deductions applicable: \$ _____

Tax Calculation

1. Enter Base Tax Liability from Tax Tables: \$ _____
2. Calculate Tax on Qualified Dividends and Capital Gains:
 - At 0% Rate: \$ _____ (if applicable)
 - At 15% Rate: \$ _____
 - At 20% Rate: \$ _____

Total Tax Due

1. Add Base Tax and Total Tax from Investments:
 - \$ _____

Signature

1. Taxpayer's Signature: _____ Date: _____