

# Qualified Dividends and Capital Gain Tax Worksheet

## Section A: Taxpayer Information

- Name: \_\_\_\_\_
- SSN: \_\_\_\_\_
- Filing Status: (Circle one) Single / Married Filing Jointly / Married Filing Separately / Head of Household

## Section B: Income Summary

- Total Reported Income: \$ \_\_\_\_\_
- Qualified Dividends: \$ \_\_\_\_\_
- Net Capital Gains: \$ \_\_\_\_\_

## Section C: Adjusted Gross Income (AGI) and Taxable Income

4. Adjusted Gross Income (AGI):

- \$ \_\_\_\_\_ (Total income minus allowable adjustments)

5. Taxable Income:

- \$ \_\_\_\_\_ (AGI minus standard/itemized deductions)

## Section D: Tax Computations

6. Base Tax on Regular Income (using tax tables): \$ \_\_\_\_\_

7. Tax on Qualified Dividends and Capital Gains:

- At 0% Rate: \$ \_\_\_\_\_
- At 15% Rate: \$ \_\_\_\_\_
- At 20% Rate: \$ \_\_\_\_\_

## Section E: Total Tax Due

8. Total Tax Due:

Base Tax + Tax on Investments =  
\$ \_\_\_\_\_