

Enter your Dividend Income (Form 1099-DIV)

Type of transaction: **Dividend Income**

Payer's Name:

Taxpayer, Spouse, or Joint?

Ordinary Dividends (Box 1a) \$

Qualified Dividends (amount of ordinary dividends that are considered qualified) (Box 1b) \$

Capital Gain to Schedule D (Box 2a) \$

Unrecaptured Section 1250 Gain (Box 2b) \$

Section 1202 Gain (Box 2c) \$

Collectibles (28%) Gain (Box 2d) \$

Nondividend Distributions (Box 3) \$

Federal Income Tax Withheld (Box 4) \$

Foreign Tax Withheld (Box 6) \$

Nominee Dividend \$

Amount of Interest on U.S. Savings Bonds and Treasury obligations that you want subtracted from your state return \$

Please select your state:

Enter each Form 1099-DIV separately.
Enter the name of payer. Don't use punctuation.

Select whether the dividend income belongs to the taxpayer, the spouse or if it is joint income.

Shows total capital gain distributions from a regulated investment company (mutual fund) or real estate investment trust. This entry flows to Schedule D.

Non-dividend distribution is a return of basis, not taxed until all cost is recovered. The taxpayer must reduce their cost by these distributions at the time of sale. Once all costs are recovered, report as capital gain.

An entry in Foreign tax paid (box 6) will flow to the foreign tax credit line on Form 1040. See the Nonrefundable Credits tab for Foreign Tax Credit information.

Enter dividends from federal bond funds which are fully taxable on the federal return but tax exempt on the state return.