

# Schedule D Tax Worksheet for Schedule J, Line 8

(Keep for your records)

**2018**

Name(s) as shown on return

Tax ID Number

1. Enter amount from Schedule J, line 7 . . . . . **1.** \_\_\_\_\_
  2. Enter your qualified dividends from  
Form 1040, line 3a . . . . . **2.** \_\_\_\_\_
  3. Enter the amount from Form 4952 (used  
to figure investment interest expense  
deduction), line 4g . . . . . **3.** \_\_\_\_\_
  4. Enter amount from Form 4952, line 4e\* **4.** \_\_\_\_\_
  5. Subtract line 4 from line 3. If zero or less, enter -0- **5.** \_\_\_\_\_
  6. Subtract line 5 from line 2. If zero or less, enter -0-\*\* . . . . . **6.** \_\_\_\_\_
  7. Enter the **smaller** of line 15 or line 16 of Schedule D **7.** \_\_\_\_\_
  8. Enter the **smaller** of line 3 or line 4 . . . . . **8.** \_\_\_\_\_
  9. Subtract line 8 from line 7. If zero or less, enter -0-\*\* . . . . . **9.** \_\_\_\_\_
  10. Add lines 6 and 9 . . . . . **10.** \_\_\_\_\_
  11. Add lines 18 and 19 of Schedule D\*\* . . . . . **11.** \_\_\_\_\_
  12. Enter the **smaller** of line 9 or line 11 . . . . . **12.** \_\_\_\_\_
  13. Subtract line 12 from line 10 . . . . . **13.** \_\_\_\_\_
  14. Subtract line 13 from line 1. If zero or less, enter -0- . . . . . **14.** \_\_\_\_\_
  15. Enter:
    - \$37,450 if single or married filing separately;
    - \$74,900 if married filing jointly or qualifying widow(er); or
    - \$50,200 if head of household.

} . . . **15.** \_\_\_\_\_
  16. Enter the **smaller** of line 1 or line 15 . . . . . **16.** \_\_\_\_\_
  17. Enter the **smaller** of line 14 or line 16 . . . . . **17.** \_\_\_\_\_
  18. Subtract line 10 from line 1. If zero or less, enter -0- **18.** \_\_\_\_\_
  19. Enter the **larger** of line 17 or line 18 . . . . . **19.** \_\_\_\_\_
  20. Subtract line 17 from line 16. This amount is taxed at 0% . . . . . **20.** \_\_\_\_\_
- If lines 1 and 16 are the same, skip lines 21 through 41 and go to line 42. Otherwise, go to line 21.**
21. Enter the **smaller** of line 1 or line 13 . . . . . **21.** \_\_\_\_\_
  22. Enter the amount from line 20 (if line 20 is blank, enter -0-) . . . . . **22.** \_\_\_\_\_
  23. Subtract line 22 from line 21. If zero or less, enter -0- . . . . . **23.** \_\_\_\_\_
  - Enter:
    - \$413,200 if single;
    - \$232,425 if married filing separately;
    - \$464,850 if married filing jointly or  
qualifying widow(er); or
    - \$439,000 if head of household

} . . . **24.** \_\_\_\_\_
  25. Enter the smaller of line 1 or line 24 . . . . . **25.** \_\_\_\_\_
  26. Add lines 19 and 20 . . . . . **26.** \_\_\_\_\_
  27. Subtract line 26 from line 25. If zero or less, enter -0- . . . . . **27.** \_\_\_\_\_
  28. Enter the **smaller** of line 23 or line 27 . . . . . **28.** \_\_\_\_\_
  29. Multiply line 28 by 15% (0.15) . . . . . **29.** \_\_\_\_\_
  30. Add lines 22 and 28 . . . . . **30.** \_\_\_\_\_
- If lines 1 and 30 are the same, skip lines 31 through 41 and go to line 42. Otherwise, go to line 31.**