

SCHEDULE B - Interest and Dividend Income

Important: Use this information to complete the IRS Schedule B form. Do not use a printed version of this template in place of an IRS approved form.

Part I Interest Income If you received more than \$400 in taxable interest income, you must complete Part I and Part III and list ALL interest received. You must report all interest on Form 1040, even if you are not required to complete Part I and Part III. If you received, as a nominee, interest that actually belongs to another person, or you received or paid accrued interest on securities transferred between interest payment dates, see IRS instructions.

Interest Income		Amount
1	Interest income from seller-financed mortgages. (List name of payer.)	5,000
2	Other interest income (List name of payer.)	250
		1,000
3	Add the amounts on lines 1 and 2. Enter the total here and Form 1040, line 8a.	6250

Part II Dividend Income If you received more than \$400 in gross dividends and/or other distributions on stock, you must complete Part II and Part III. You must report all taxable dividends on Form 1040, even if you are not required to complete Part II and Part III. If you received, as a nominee, dividends that actually belong to another person, see IRS instructions.

Dividend Income		Amount
4	Dividend income (List name of payer—include on this line capital gain distributions, nontaxable distributions, etc.)	5,000
5	Add the amounts on line 4. Enter the total here.	5000
6	Capital gain distributions	1,200
7	Nontaxable distributions	1,300
8	Add the amounts on lines 6 and 7. Enter the total here	2500
9	Subtract line 8 from line 5. Enter the result here and on Form 1040, line 9.	2500

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