



Name(s) as shown on page 1 of the IA 1040

Social Security Number

**NOTE:** You must report all taxable interest and dividends on IA 1040, even if you are not required to complete Schedule B.**PART I: INTEREST INCOME**

You must complete this part if you received more than \$1,500 in interest in 2012. Interest income which should be reported includes earnings from savings and loan associations, mutual savings banks, cooperative banks, credit unions, and bank deposits; state and municipal bonds (see instructions for IA 1040, line 2, Taxable Interest Income), and interest from tax refunds. Report both exempt and taxable interest.

**Total Taxable Interest:** If **filing status 1, 2, 5, or 6** – report total taxable interest on line 2, column A on the IA 1040; none should be reported in column B. If **filing status 3** – the taxpayer will enter on line 2, column A on the IA 1040, the total taxable interest from accounts owned by the taxpayer, plus 50% of any amount from a joint account. The spouse will enter in Column B on the IA 1040, the total taxable interest from accounts owned by the spouse, plus 50% of any amount from a joint account. If **filing status 4** – the amount entered on line 2, column A on the IA 1040 will be the total taxable interest from accounts owned by the taxpayer, plus 50% of any amount from a joint account; nothing is reported in column B.

**Account Ownership:** For each payer, indicate the type of account ownership. If the interest was earned by you, check "Taxpayer." For interest earned by your spouse, check "Spouse." If the interest was earned jointly, check "Joint." Check only one for each payer.

Name of Payer (list names of all payers)	Total Interest (must equal the total of Exempt & Taxable Interest)	Interest Exempt from Iowa Tax	Taxable Interest	Account Ownership Check one for each payer		
				Taxpayer	Spouse	Joint
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
<b>TOTALS</b>	\$	\$	\$			

**PART II: DIVIDEND INCOME**

You must complete this part if you received more than \$1,500 in gross dividends in 2012. Report both exempt and taxable dividends.

**Total Taxable Dividends:** If **filing status 1, 2, 5, or 6** – report total taxable dividends on line 3, column A on the IA 1040; none should be reported in column B. If **filing status 3** – the taxpayer will enter on line 3, column A on the IA 1040, the total taxable dividends from accounts owned by the taxpayer, plus 50% of any amount from a joint account. The spouse will enter in Column B on the IA 1040, the total taxable dividends from accounts owned by the spouse, plus 50% of any amount from a joint account. If **filing status 4** – the amount entered on line 3, column A on the IA 1040 will be the total taxable dividends from accounts owned by the taxpayer, plus 50% of any amount from a joint account; nothing is reported in column B.

**Account Ownership:** For each payer, indicate the type of account ownership. If the dividend was earned by you, check "Taxpayer." For dividends earned by your spouse, check "Spouse." If the dividend was earned jointly, check "Joint." Check only one for each payer.

Name of Payer (list names of all payers)	Total Dividends (must equal the total of Exempt & Taxable Dividends)	Dividends Exempt from Iowa Tax	Taxable Dividends	Account Ownership Check one for each payer		
				Taxpayer	Spouse	Joint
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
<b>TOTALS</b>	\$	\$	\$			