

If you need more space, you may photocopy.

Name shown first on the PA-40 (if filing jointly)

Social Security Number (shown first)

CAUTION: Federal and PA rules for taxable interest and dividend income are different. **Read the instructions.**

If your total taxable interest and dividend income (taxpayer, spouse and/or joint) are both \$2,500 or less, you must report the income, but do not need to submit any schedule. If either your total interest or dividend income (taxpayer spouse and/or joint) is more than \$2,500, you must submit a PA Schedule A and/or B. A taxpayer and spouse must complete separate schedules to report their income or if any amounts are reported on Lines 3 through 7 of Schedule A or Lines 3 and 4 of Schedule B. However, if all the income is earned on a joint basis, one schedule may be completed. Complete the oval to indicate whether the income included on the schedule is from the taxpayer, spouse or joint. When reporting interest and/or dividend income from jointly owned accounts not reported on a joint Schedule A and/or B, the taxpayer and spouse must show their share of the interest and/or dividend income on their separate Schedules A and/or B.

PA-40 A (08-11) (FI)

Taxpayer ☐

Spouse ☐

Joint [illegible]

IMPORTANT: Capital Gains Distributions are dividend income for PA purposes.

PA-40 B (08-11) (FI)

Taxpayer

Spouse ☐

Joint [illegible]