



FIRST NAME

M.I. LAST NAME

SOCIAL SECURITY NUMBER

Schedule B Interest, Dividends and Certain Capital Gains and Losses

2011

PART 1. INTEREST AND DIVIDEND INCOME

If you received any interest income other than interest from Massachusetts banks, or if you received more than \$1,500 in gross dividend income, or if you have certain capital gains/losses, or any adjustments to interest and dividend income, complete Schedule B (see instructions). Otherwise, enter dividends of \$1,500 or less on Form 1, line 20 or Form 1-NR/PY, line 24. In all cases enter 5.3% interest from Massachusetts banks on Form 1, line 5a or Form 1-NR/PY, line 7a.

1	Total interest income (from U.S. Form 1040 or 1040A, line 8a and line 8b; or Form 1040EZ, line 2) . . .	1								0	0
2	Total ordinary dividends (from U.S. Schedule B, Part II, line 6, or U.S. Schedule 1, Part II, line 6. If U.S. Schedule B or U.S. Schedule 1 not filed, from U.S. 1040 or 1040A, line 9a)	2								0	0
3	Other interest and dividends not included above (enclose statement)	3								0	0
4	Total interest and dividends. Add lines 1, 2 and 3	4								0	0
5	Total interest from Massachusetts banks (from Form 1, line 5a or Form 1-NR/PY, line 7a)	5								0	0
6	Other interest and dividends to be excluded (enclose statement) (this includes interest on U.S./ Commonwealth debt obligations and interest and dividends taxed directly to Mass. estates and trusts)	6								0	0
7	Subtotal: Line 4 minus lines 5 and 6. Not less than "0"	7								0	0
8	Allowable deductions from your trade or business (from Mass. Schedule C-2). See instructions	8								0	0
9	Subtotal: Subtract line 8 from line 7. Not less than "0." If you have no short-term capital gains or losses, net long-term capital losses, long-term gains on collectibles and pre-1996 installment sales, short-term gains or losses from the sale, exchange or involuntary conversion of property used in a trade or business, allowable deductions from your trade or business against short-term capital gains, carryover short-term losses from prior years, or excess exemptions, omit lines 10–37. Enter this amount in line 38 and on Form 1, line 20 or Form 1-NR/PY, line 24, and omit lines 39 and 40. Otherwise, complete Parts 2, 3 and 4	9								0	0

PART 2. SHORT-TERM CAPITAL GAINS/LOSSES & LONG-TERM GAINS ON COLLECTIBLES

10	Short-term capital gains (included in U.S. Schedule D, lines 1 through 5, col. h)	10								0	0
11	Long-term capital gains on collectibles and pre-1996 installment sales (from Massachusetts Schedule D, line 12)	11								0	0
12	Gain on the sale, exchange or involuntary conversion of property used in a trade or business and held for one year or less (from U.S. Form 4797)	12								0	0
13	Add lines 10 through 12	13								0	0
14	Allowable deductions from your trade or business (from Mass. Schedule C-2). See instructions	14								0	0
15	Subtotal: Subtract line 14 from line 13. Not less than "0"	15								0	0
16	Short-term capital losses (included in U.S. Schedule D, lines 1 through 5, col. h)	16	<input checked="" type="checkbox"/>							0	0
17	Loss on the sale, exchange or involuntary conversion of property used in a trade or business and held for one year or less (from U.S. Form 4797)	17	<input checked="" type="checkbox"/>							0	0
18	Prior short-term unused losses for years beginning after 1981 (from 2010 Massachusetts Schedule B, line 40)	18	<input checked="" type="checkbox"/>							0	0
19	Combine lines 15 through 18. If "0" or greater, omit lines 20 through 23 and enter this amount in line 24. If less than "0," complete line 20	19	<input checked="" type="checkbox"/>							0	0
20	Short-term losses applied against interest and dividends. Enter the smaller of line 9 or line 19 (considered as a positive amount). Not more than \$2,000	20								0	0

▼ If showing a loss, mark an X in box at left



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Grid for Social Security Number

Table with 3 columns: Line number, Description, and Amount. Lines 21-28 include items like 'Available short-term losses', 'Short-term losses applied against long-term gains', etc.

PART 3. ADJUSTED GROSS INTEREST, DIVIDENDS, SHORT-TERM CAPITAL GAINS AND LONG-TERM GAINS ON COLLECTIBLES

Table with 3 columns: Line number, Description, and Amount. Lines 29-34 include items like 'Enter the amount from line 9', 'Short-term losses applied against interest and dividends', etc.

PART 4. TAXABLE INTEREST, DIVIDENDS AND CERTAIN CAPITAL GAINS

Table with 3 columns: Line number, Description, and Amount. Lines 35-40 include items like 'Adjusted gross interest, dividends and certain capital gains', 'Excess exemptions', 'Taxable 12% capital gains', etc.