PA SCHEDULE B
Dividend Income

PA-40 Schedule B
(07-14)(FI)

2014

OFFICIAL USE ONLY

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

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

If your total PA-taxable dividend and capital gains distributions income (taxpayer, spouse and/or joint) is equal to the amount reported on your federal return and does not include any amounts for Lines 2 through 9 of PA Schedule B, you must report your income on Line 3 of the PA-40, but you do not have to submit PA Schedule B. If there are any amounts (taxpayer, spouse and/or joint) for any of the Lines 2 through 9, you must complete and submit PA Schedule B with your PA-40. A taxpayer and spouse must complete separate schedules to report their income if any amounts are reported on Lines 2 through 9 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. If a separate PA Schedule B is prepared for a taxpayer and spouse, include only the taxpayer or spouse share of the income for each line.

PA SCHEDULE B – PA-Taxable Dividend and
Capital Gains Distributions Income (See the instructions.)

PA-40 B (07-14)   **Taxpayer** ⬭   **Spouse** ⬭   **Joint** ⬭

1. Dividend income from Line 9a of your federal return.	1.	$
2. Dividend income from federal Schedule K-1(s). **See instructions.**	2.	$
3. Tax-exempt dividend income. **See instructions.**	3.	$
4. Other reduction adjustments. **See instructions.** Description: _____	4.	$
5. Add the amounts on Lines 2, 3 and 4.	5.	$
6. Subtract Line 5 from Line 1.	6.	$
7. Other addition adjustments. **See instructions.** Description: _____	7.	$
8. Capital Gains Distributions - **See instructions.**	8.	$
9. Dividend income from PA S corporation(s) and partnerships, from your PA Schedule(s) RK-1 or federal Schedule(s) K-1.	9.	$
10. Total PA-Taxable Dividend Income. Add Lines 6, 7, 8 and 9. Enter on Line 3 of your PA-40.	10.	$