



Name(s) as shown on Form 1040 (Do not enter name and social security number if shown on other side.)

Your social security number

Part I Interest Income

If you received more than \$400 in interest income, you must complete Part I and list ALL interest received. If you received interest as a nominee for another, or you received or paid accrued interest on securities transferred between interest payment dates, see page 22.

(See Instructions on pages 8 and 22.)

Also complete Part III.

Table with 3 columns: Interest income, Amount, and a sub-column for amounts. Rows include interest from seller-financed mortgages, other interest income, and a total row.

Part II Dividend Income

If you received more than \$400 in gross dividends and other distributions on stock, or you are electing to exclude qualified reinvested dividends from a public utility, complete Part II. If you received dividends as a nominee for another, see page 23.

(See Instructions on pages 8 and 22.)

Also complete Part III.

Table with 3 columns: Dividend income, Amount, and a sub-column for amounts. Rows include dividend income, capital gain distributions, nontaxable distributions, and a total row.

\*If you received capital gain distributions for the year and you do not need Schedule D to report any other gains or losses, do not file that schedule. Instead, enter 40% of your capital gain distributions on Form 1040, line 14.

Part III Foreign Accounts and Foreign Trusts

(See Instructions on page 23.)

If you received more than \$400 of interest or dividends, OR if you had a foreign account or were a grantor of, or a transferor to, a foreign trust, you must answer both questions in Part III.

Table with 3 columns: Question, Yes, No. Questions 11 and 12 regarding foreign accounts and trusts.