

Name(s) \_\_\_\_\_ 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.

**Total Taxable Interest and Dividends:**

- Filing status 1, 2, 5, or 6 – the amount entered in column A on the IA 1040 will be the total taxable interest and dividends from accounts owned by the taxpayer; nothing is reported in column B.
- Filing status 3 – the amount entered in column A on the IA 1040 will be the total taxable interest and dividends from accounts owned by the taxpayer, plus 50% of any amount from a joint account. The amount entered in column B on the IA 1040 will be the total taxable interest and dividends from accounts owned by the spouse, plus 50% of any amount from a joint account.
- Filing status 4 – the amount entered in column A on the IA 1040 will be the total taxable interest and 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 interest and/or dividends were earned by you, check "Taxpayer." For interest and/or dividends earned by your spouse, check "Spouse." If the interest and/or dividends were earned jointly, check "Joint." Check only one for each payer.

**Part I: Interest Income**

Complete Part I if you received more than \$1,500 in interest in 2016. 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 total, exempt, and taxable interest.

Name of Payers List names of all payers. If additional lines are needed, include additional page.	Total Interest (must equal the total of Exempt & Taxable Interest)	Interest Exempt from Iowa Tax	Taxable Interest	Taxpayer	Spouse	Joint
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			

Total taxable interest entered on line 2 of the IA 1040 .....\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

**Part II: Dividend Income**

Complete Part II if you received more than \$1,500 in gross dividends in 2016. Report total, exempt, and taxable dividends.

Name of Payers List names of all payers. If additional lines are needed, include additional page.	Total Dividends (must equal the total of Exempt & Taxable Dividends)	Dividends Exempt from Iowa Tax	Taxable Dividends	Taxpayer	Spouse	Joint
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			
	\$	\$	\$			

Total taxable dividends entered on line 3 of the IA 1040....\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

Include a copy of this schedule with your return.

