

# PA SCHEDULE A/B

Interest Income/Dividend Income

PA-40 Schedule A/B  
(06-12) (FI)

# 2012

OFFICIAL USE ONLY

If you need more space, you may photocopy.

Name shown first on the PA-40 (if filing jointly)	Social Security Number (shown first)
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**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 SCHEDULE A - PA-Taxable Interest Income (See the instructions.)

<b>PA-40 A</b> (06-12) (FI)	Taxpayer <input type="radio"/>	Spouse <input type="radio"/>	Joint <input type="radio"/>
1.			1.
<b>2. Total Interest Income.</b> Add all amounts listed (including amounts on additional schedules).			2.
<b>3.</b> Distributions from Life Insurance, Annuity or Endowment Contracts included in federal taxable income.			3.
<b>4.</b> Distributions from Charitable Gift Annuities included in federal taxable income.			4.
<b>5.</b> Distributions from IRC Section 529 Qualified Tuition Programs for non educational purposes.			5.
<b>6.</b> Distributions from Health/Medical Savings Accounts included in federal taxable income.			6.
<b>7.</b> Interest income from PA S corporations and partnership(s), from your PA Schedule(s) RK-1.			7.
<b>8. Total PA-Taxable Interest Income.</b> Add Lines 2, 3, 4, 5, 6 and 7. Enter on Line 2 of your PA-40.			8.

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

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

<b>PA-40 B</b> (06-12) (FI)	Taxpayer <input type="radio"/>	Spouse <input type="radio"/>	Joint <input type="radio"/>
1.			1.
<b>2. Total Dividend Income.</b> Add all amounts listed (including amounts on additional schedules).			2.
<b>3.</b> Capital Gains Distributions - <b>See instructions</b>			3.
<b>4.</b> Dividend income from PA S corporation(s) and partnerships, from your PA Schedule(s) RK-1.			4.
<b>5. Total PA-Taxable Dividend Income.</b> Add Lines 2, 3 and 4. Enter on Line 3 of your PA-40.			5.