0901210054

PA SCHEDULE A/B

Interest Income/Dividend Income

PA-40 Schedule A/B
(09-09) (FI)

2009

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If you need more space, you may photocopy.

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

CAUTION: Federal and PA rules for taxable interest and dividend income are different. **Read the instructions.**
If your taxable interest and dividend income are each $2,500 or less, you must report the income, but do not need to submit any schedule.
If either your interest income or dividend income is more than $2,500, you must submit a PA Schedule A and/or B.

PA-40 A (09-09) PA SCHEDULE A - PA-Taxable Interest Income (See the instructions.)

1.	1.	
2. Total Interest Income. Add all amounts listed (including amounts on additional schedules).	2.	
3. Distributions from Life Insurance, Annuity or Endowment Contracts included in federal taxable income.	3.	
4. Distributions from Charitable Gift Annuities included in federal taxable income.	4.	
5. Distributions from IRC Section 529 Qualified Tuition Programs for non educational purposes.	5.	
6. Distributions from Health/Medical Savings Accounts included in federal taxable income.	6.	
7. Interest income from PA S corporations and partnership(s), from your PA Schedule(s) RK-1.	7.	
8. Total PA-Taxable Interest Income. 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.

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PA-40 B (09-09) PA SCHEDULE B – PA-Taxable Dividend and Capital Gains Distributions Income (See the instructions.)

1.	1.	
2. Total Dividend Income. Add all amounts listed (including amounts on additional schedules).	2.	
3. Capital Gains Distributions - **See instructions**	3.	
4. Dividend income from PA S corporation(s) and partnerships, from your PA Schedule(s) RK-1.	4.	
5. Total PA-Taxable Dividend Income. Add Lines 2, 3 and 4. Enter on Line 3 of your PA-40.	5.	

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