

PA SCHEDULE A/B

Interest Income/Dividend Income

PA-40 Schedule A/B
(06-13) (FI)

2013

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)

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.)

PA-40 A (06-13)

Taxpayer ☐

Spouse ☐

Joint [illegible]

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

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

PA-40 B (06-13)

Taxpayer

Spouse ☐

Joint

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.