

PA SCHEDULE A & B

Interest and Dividend Income PA-40 A/B/J (09-02)

2002

OFFICIAL USE ONLY

If you need more space, you may photocopy these schedules or prepare your own schedules in these formats.

Name shown first on the PA tax return (even 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 either your taxable interest or dividend income is \$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 schedule. If you must adjust your federal income, enter your federal amount on Line 1, make your corrections, and explain them in the space under Filing Option 3.

Filing options:

- 1. Submit a copy of your federal schedule — you do not need this schedule.
2. Enter your federal taxable interest and/or dividend income — do not submit your Federal Schedule B.
3. Otherwise, list the name of each payer and the amount of PA taxable interest and dividend income you received in 2002.

PA SCHEDULE A - PA Taxable Interest Income

Filing option 2. Enter the amount from your Federal Schedule B (Form 1040) or Schedule I (Form 1040A). 1. \$

Filing option 3. PA Taxable Interest Income. See the instructions.

Table with 2 columns: Description and Amount. Rows include Total Interest Income, Interest income from partnership(s), Interest income from PA S corporation(s), and Total PA Taxable Interest Income.

IMPORTANT: Capital gain distributions are dividend income for PA purposes.

PA SCHEDULE B - PA Taxable Dividend Income

Filing option 2. Enter the amount from your Federal Schedule B (Form 1040) or Schedule I (Form 1040A). 1. \$

Filing option 3. PA Taxable Dividend Income. See the instructions.

Table with 2 columns: Description and Amount. Rows include Total Dividend Income, Dividend income from partnership(s), Dividend income from PA S corporation(s), and Total PA Taxable Dividend Income.

PA-40 J (09-02)

PA SCHEDULE J - Income from Estates or Trusts

2002

Name shown first on the PA tax return (even if filing jointly):

Social Security Number

Read the instructions. List the name, address, and identification number of each estate or trust. If you received a Federal Schedule K-1, instead of a PA Schedule L, see the instructions. Indicate if the beneficiary is the taxpayer (T - the name shown first on the PA-40) or the spouse (S). Use (J) if you and your spouse are joint beneficiaries.

Table with 4 columns: (a) Name and address of each estate or trust, T/S/J, (b) Federal EIN, (c) Income Amount.

Income from partnership(s), from your PA Schedule(s) RK-1 or NRK-1.

Income from PA S corporation(s), from your PA Schedule(s) RK-1 or NRK-1.

Total Estate or Trust Income.

Add Column (c). Include on Line 7 of your PA-40.