



RIGHTPATH™

Investments & Financial Planning, Inc.

2010 Key Numbers: Investment Planning

Winter 2010

Have you examined the way tax rules inform your investing choices lately? Knowing these figures may help you make more informed decisions.

Investment Planning	2008	2009	2010
Tax on long-term capital gains			
Taxpayers in marginal tax brackets greater than 15%	15%	15%	15%
Taxpayers in marginal tax brackets 15% or less	0%	0%	0%
Tax on dividends			
*Maximum tax rate on dividends received by an individual shareholder from domestic and qualified foreign corporations			
Taxpayers in marginal tax brackets greater than 15%	15%	15%	15%
Taxpayers in marginal tax brackets 15% or less	0%	0%	0%

(Prior to 2003 Tax Act dividends were taxed as ordinary income)

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