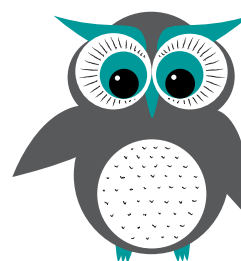


# SELF- ASSESSMENT GUIDE.

LET US GUIDE YOU TO THE RIGHT PLACE TO PRINT  
ALL THOSE ESSENTIAL DOCUMENTS REQUIRED FOR  
SELF-ASSESSMENT.



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# SELF-ASSESSMENT

## THE DOCUMENTS.

### TAX CALCULATION

Every individual who files a self-assessment tax return to HMRC can obtain evidence of their earnings by way of SA302. This certificate provides a summary of the income that was declared to HMRC and shows tax due.

In April 2015, HMRC agreed with mortgage lenders that Tax Calculation and Tax Year Overview forms are an acceptable substitute to the SA302. Both sets of documents are required for Mortgage Application purposes.

- The Tax Calculation (also known as Tax Computation) shows the breakdown of the income returned on the customer's tax return
- The Tax Year Overview verifies that the information submitted is correct and reports on any payment made toward any tax due as per the Tax Calculation

### TAX CALCULATION

1. Log into your HMRC online account (go to [www.online.hmrc.gov.uk/login](http://www.online.hmrc.gov.uk/login))
2. Click on "Self Assessment details and options"
3. Select "tax return options" from the left hand menu
4. Choose the year from the drop down menu and select the "Go" button.
5. Select the "View return" button.
6. Select "view calculation"
7. Select "view and print your calculation"

### TAX YEAR OVERVIEW

1. Follow steps 1 and 2 as above
2. Select "view account" from the left hand menu
3. Select "tax years" from the next menu
4. Choose the year from the drop down menu and select the "Go" button
5. Click on "Print your tax year overview"

### NOTE

If you use an accountant, you should be able to request the documents from them directly.

Where your tax return was sent using commercial software, said software is required to print the Tax Calculation. If you are unable to do so, or you sent your return by post, you will need to contact HMRC to get a copy of your Tax Calculation sent out to you.

HMRC can be contacted on 0300 200 3310. You will need your National Insurance Number & Self-Assessment Unique Taxpayer Reference (UTR) for security.

**NEED HELP? CONTACT US** | [WWW.WAM.FINANCE](http://WWW.WAM.FINANCE) | [INFO@WAM.FINANCE](mailto:INFO@WAM.FINANCE)

A BROKER FEE OF UP TO £550 MAY BE PAYABLE ON APPLICATION.  
YOUR HOME OR PROPERTY MAY BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON YOUR MORTGAGE