Anglo-Celtic
FINANCIAL CONSULTANTS LTD

How to download your Tax Calculations, Tax Returns (SA100), and Tax Year Overviews from the .gov.uk website

Mortgage Lenders nearly always require you to provide your HMRC tax documents to support and evidence the income you have earned and declared for your self-employed, dividend, employment and property related remuneration.

HM Revenue & Customs (HMRC) provides an way to access this information online.

Read below to see how to view and download the necessary tax documents and proof of income.

<u>Tax Calculations</u>

Log into the HMRC online account (go to https://www.gov.uk/sa302-tax-calculation)
Scroll down and Log In
Select ‘Self Assessment’ (if you are only registered for Self Assessment then you will automatically be directed to this screen)
Follow the link ‘Get SA302 Tax Calculation for tax year 20xx to 20xx'
Follow the link ‘Continue to your SA302’
Click the ‘view your Calculation’ link
Scroll to the bottom of the page
Click on 'View and print your calculation' (should look like this)
Select 'Save as PDF'
Save to a folder.

Tax Year Overviews

An additional HMRC online document called a Tax Year Overview will be required to verify that the Tax Calculation information is correct, whether using online or paper-based Tax Calculations.

The Tax Year Overview is produced by HMRC after the customer has submitted their self-assessment tax return. It shows the amount of tax due to be paid directly to HMRC or any available amount for a refund for a given tax year.

- Log into the HMRC online account (go to https://www.gov.uk/sa302-tax-calculation)
- Scroll down and Log In
- Select 'Self Assessment' (if you are only registered for Self Assessment then you will automatically be directed to this screen)
- Follow the link 'View Self Assessment return for tax year 20xx to 20xx'
- Select the appropriate tax year you require from the drop down box
- Click 'Go'
- Scroll down and click on 'Print your tax year overview' (should look like this)
- Select 'Save as PDF'
- Save to a folder

Tax Returns / SA100

Your Tax return (SA100) can also be viewed / printed / downloaded from the .gov.uk website too

- Log into the HMRC online account (go to https://www.gov.uk/sa302-tax-calculation)
- Scroll down and Log In
- Select 'Self Assessment' (if you are only registered for Self Assessment then you will automatically be directed to this screen)
- Follow the link 'More details about your Self Assessment returns and payments'
- In the 'Your returns' section, click on 'View Self Assessment return for tax year 20xx to 20xx' (OR, scroll down and select appropriate year from the Previously Submitted returns' list)
- IMPORTANT – NOW SELECT 'TAX RETURN OPTIONS' from the right hand menu
- Select the appropriate tax year from the drop down menu and click 'Go'
- Scroll down and click 'View Return'
- On the left hand menu of the next page, click on on 'View / Print / Save your return
- Scroll down to the 'colour copy' option, and click on 'Print a colour PDF copy of your return'
- This should then open a .pdf document for you to view
- Save to a folder

IF YOU FOLLOW THE ABOVE, THEN YOUR DOCUMENTS WILL (AND MUST) LOOK LIKE THIS.

ALTERNATIVE FORMATS AND STYLES MAY NOT BE ACCEPTABLE TO A MORTGAGE LENDER!

Tax Calculation

GOV.UK

[redacted]s tax return 2018-19

Sign out

Unique Taxpayer Reference (UTR): [redacted]
Your tax return is 100% complete

View your calculation

This section provides you with a breakdown of your full calculation. If it says your tax return is 100% complete then you have submitted your return and this is a copy of the information held on your official online Self Assessment tax account with HM Revenue and Customs.

Profit from UK land and property	£13,905.00
Total income received	£13,905.00
minus Personal Allowance	£11,850.00
Total income on which tax is due	£2,055.00

How we have worked out your income tax

	Amount	Percentage	Total
Pay, pensions, profit etc. (UK rate for England, Wales and Northern Ireland)			
Basic rate	£2,055.00	x 20%	£411.00
Savings interest from banks or building societies, securities etc.			
Starting rate	£0.00	x 0%	£0.00
Basic rate band at nil rate	£0.00	x 0%	£0.00
Basic rate	£0.00	x 20%	£0.00
Higher rate band at nil rate	£0.00	x 0%	£0.00
Total income on which tax has been charged			£2,055.00
Income Tax due			£411.00
plus **Class 2 National Insurance contributions**	£153.40		
Total Class 2 National Insurance contributions due			£153.40
Income Tax and Class 2 National Insurance contributions due			£564.40

Estimated payment due by 31 January 2020
You must pay the total of any tax and class 4 NIC due for 2018-19 plus first payment on account due for 2019-20 by **31 January 2020**

(Note: 2nd payment of £0.00 due 31 July 2020)
This amount does not take into account any 2018-19 payments on account you may have already made

2018-19 balancing payment	£564.40
Total due by 31 January 2020	£564.40

Print your full calculation

Tax Year Overviews

GOV.UK

Information as at 18 Feb 2020

[redacted]

Unique Taxpayer Reference (UTR): [redacted]

Tax years

Tax year overview

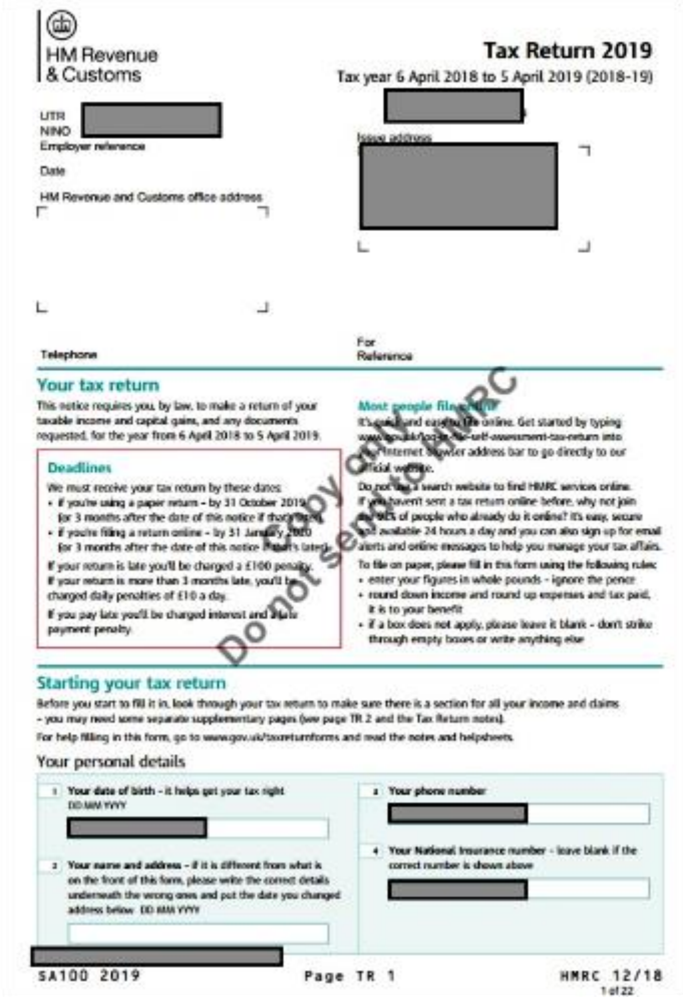
Tax year ending 05 Apr 2019.

This is a copy of the information held on your official online Self Assessment tax account with HM Revenue and Customs.

Please note: To view a breakdown of an amount, follow the appropriat link in the 'Description' column.

Description	Amount (£)
Tax	564.40
Surcharges	0.00
Interest	0.00
Penalties	0.00
Sub total	**564.40**
Less payments for this year	564.40
Less other adjustments	0.00
Total	0.00

Tax Returns / SA100



HM Revenue & Customs

Tax Return 2019

Tax year 6 April 2018 to 5 April 2019 (2018-19)

UTR [redacted]
NINO
Employer reference

[redacted]

Issue address

[redacted]

Date

HM Revenue and Customs office address

Telephone

For Reference

Your tax return

This notice requires you, by law, to make a return of your taxable income and capital gains, and any documents requested, for the year from 6 April 2018 to 5 April 2019.

Deadlines

We must receive your tax return by these dates:

- if you're using a paper return – by 31 October 2019 (or 3 months after the date of this notice if that's later)
- if you're filing a return online – by 31 January 2020 (or 3 months after the date of this notice if that's later)

If your return is late you'll be charged a £100 penalty. If your return is more than 3 months late, you'll be charged daily penalties of £10 a day.

If you pay late you'll be charged interest and a late payment penalty.

Most people file online

It's quick and easy to file online. Get started by typing www.gov.uk/log-in-file-self-assessment-tax-return into your Internet browser address bar to go directly to our official website.

Do not use a search website to find HMRC services online.

If you haven't sent a tax return online before, why not join the 90% of people who already do it online? It's easy, secure and available 24 hours a day and you can also sign up for email alerts and online messages to help you manage your tax affairs.

To file on paper, please fill in this form using the following rules:

- enter your figures in whole pounds – ignore the pence
- round down income and round up expenses and tax paid, it is to your benefit
- if a box does not apply, please leave it blank – don't strike through empty boxes or write anything else

Copy only
Do not send to HMRC

Starting your tax return

Before you start to fill it in, look through your tax return to make sure there is a section for all your income and claims – you may need some separate supplementary pages (see page TR 2 and the Tax Return notes).

For help filling in this form, go to www.gov.uk/taxreturnforms and read the notes and helpsheets.

Your personal details

1 Your date of birth – it helps get your tax right
DD MM YYYY
[redacted]

2 Your name and address – if it is different from what is on the front of this form, please write the correct details underneath the wrong ones and put the date you changed address below DD MM YYYY

3 Your phone number
[redacted]

4 Your National Insurance number – leave blank if the correct number is shown above
[redacted]

[redacted]

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