



# Self-Employed Client Support



Leeds Building Society

# How to access these documents



## HMRC self-assessment online

If you usually submit your tax return through HMRC's Online Services you can log on in the usual way and print copies of your SA302 Tax Calculation and Tax Year Overview.

This is the quickest and easiest way to access these documents, and whilst not all lenders will accept downloaded copies, we at Leeds Building Society are happy to do so.

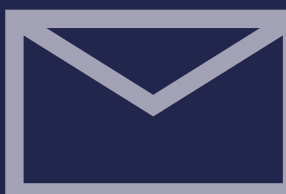
Included in this guide is step-by-step advice on how to do this.

## By Post

If you normally send a paper tax return, then you should automatically receive a copy of your Tax Calculation (SA302) once the return has been processed, this will come via the post.

## Commercial Software

If you use commercial software for your tax returns you can also print your Tax Calculation from there. Your Tax Year Overview however, will need to be printed from your official online self-assessment account the same as above.



# Example Tax Calculation (SA302)

As seen when calculated via a HMRC online account.



Online Services

tax return: **2011-12 IN PROGRESS**  
Your tax return is **90%** complete

## 6. View your calculation

### Tax calculation

This section provides you with a breakdown of your full calculation.

Pay from employments	£12,376.00
Pay from all employments	£12,376.00
Profit from self-employment	£8,218.00
<b>Total income received</b>	<b>£20,594.00</b>
<i>minus</i> Personal allowance	£7,475.00
<b>Total income on which tax is due</b>	<b>£13,119.00</b>

### How we have worked out your income tax

Your basic rate limit has been increased by £1,083.00 to £36,083.00 for Gift Aid payments.

This reduces the amount of income charged to higher rates of tax.

	Amount	Percentage	Total
Pay, pensions, profit etc	£13,119.00	@ 20%	£2,623.80
<b>Total income on which tax has been charged</b>	<b>£13,119.00</b>		
<b>Income Tax charged</b>			<b>£2,623.80</b>
<b>plus Class 4 National Insurance contributions</b>	<b>£993.00</b>	<b>@ 9%</b>	<b>£89.37</b>
<b>Income Tax and Class 4 National Insurance contributions due</b>			<b>£2,713.17</b>
<i>minus</i> Tax deducted			
From all employments			£1,699.00
<b>Total tax deducted</b>			<b>£1,699.00</b>
<b>Income Tax and Class 4 National Insurance contributions due</b>			<b>£1,014.17</b>

### Total you must pay by 31 January 2013

You must pay the total of any tax and class 4 NIC due for 2011-12 plus first payment on account due for 2012-13 by **31 January 2013**.

This calculation does not take into account any 2011-12 payments on account you may have already made

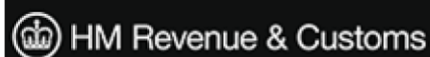
If you want to make changes or additions to your return, go to [3. Tailor Your Return](#).

[Print your full calculation](#)



# Example Tax Year Overview

As seen when printed from an HMRC online account.



[Home](#) [Cymraeg](#) [Contact HMRC](#) [Help](#)

[Sign Out](#)

Information as at 25 Mar 2015

**MRJ SMITH**

Unique Taxpayer Reference (UTR):111111111

## Tax years

### Tax year overview

Please select the appropriate tax year you wish to view a summary for from the drop-down menu and click 'Go'.

Tax year ending:

You can also view tax returns due/received by following [Tax return options](#).

**Tax year ending 05 Apr 2014\_DD Apr 05 Apr 2014.**

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

[Print your tax year overview](#)

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

Description	Amount (£)
<a href="#">Tax</a>	16,140.60
Surcharges	0.00
Interest	0.00
Penalties	0.00
<b>Sub total</b>	<b>16,140.60</b>
Less payments for this year	0.00
<a href="#">Less other adjustments</a>	0.00
<b>Total</b>	<b>16,140.60</b>

# Example Tax Year Overview

As seen when printed and issued by HMRC.

## Self Assessment

- At a glance
- About you
- Ask a question
- View account**
  - Current position
  - Tax years**
  - Surcharges
  - Interest
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  - Payments/credits received
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- Tax return options
- Reduce payments on account
- Request a repayment
- View statements
- Direct Debit payment
- FAQs

## Tax years

### Tax year overview

Please select the appropriate tax year you wish to view a summary for from the drop-down menu and click 'Go'.

Tax year ending:

You can also view tax returns due/received by following [Tax return options](#).

**Tax year ending**

If you wish to print this information for your records, please use the print facility on your browser.

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

Description	Amount (£)
<a href="#">Tax</a>	
<a href="#">Tax overpaid from return filed</a>	
Surcharges	
Interest	
Penalties	
<b>Sub total</b>	
<a href="#">Less payments for this year</a>	
<a href="#">Less other adjustments</a>	
<b>Total</b>	

# A how to guide: Printing Tax Calculation documents



Log into the HMRC online account via  
[online.hmrc.gov.uk](https://online.hmrc.gov.uk)

Select 'Self-Assessment'

(Note: if you are only registered for Self-Assessment you will be automatically directed to this screen)

Follow the link 'View your Tax Return'

Follow the link 'Tax return options'

Select the year from the dropdown menu  
and click the 'Go' button

Select the 'View return' button

Follow the link 'View calculation'

Follow the link 'View and print your  
calculation'

Follow the link at the bottom of the page to  
'Print your full calculation'

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This guide is intended as a summary only and does not constitute legal advice given by Leeds Building Society. No reliance should be placed on this guide and you must make your own decisions, we recommend that you seek legal and/or financial advice if you have any questions or queries.

Mortgages which are for Buy to Let properties are exempt from FCA Rules.

