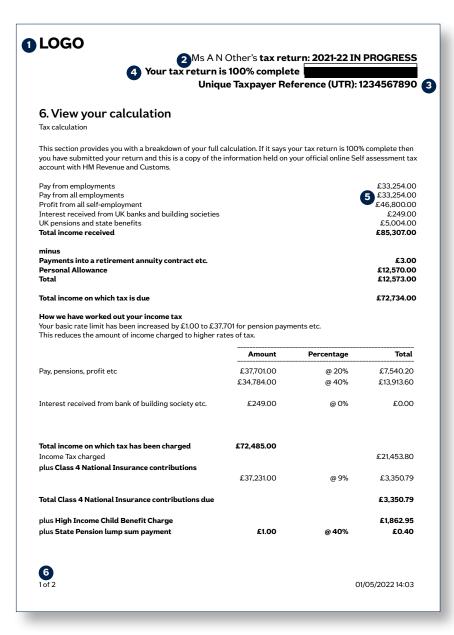


A guide to our HMRC Tax Calculation & Tax Year Overview requirements

Online HMRC Tax Calculation



All figures used are for illustrative purposes only

If you need to provide any additional information to help progress your case, please upload a separate document or call us on 0345 730 20 11

- The GOV.UK logo must be shown, unless the applicant is using commercial software to obtain their tax calculation.
 These are acceptable but will not include the
- GOV.UK logo.The customer's name and tax year must be shown.
- 3 The Unique Tax Reference number must be shown.
- 4 Progress bar must show 'your tax return is 100% complete' & state "This section provides you with a breakdown of your full calculation. If it says your tax return is 100% complete then you have submitted this return and this is a copy of information held on your official online SA tax account with HMRC".

NB – If the customer uses Commercial software then this wording may not appear. The document would still be acceptable.

- 5 Income from the relevant income stream to be taken from here.
- 6 All pages must be received.

For self-employed applicants who self-assess online, you must obtain the corresponding two years' tax year overviews in addition to the latest two years' Tax Calculations.

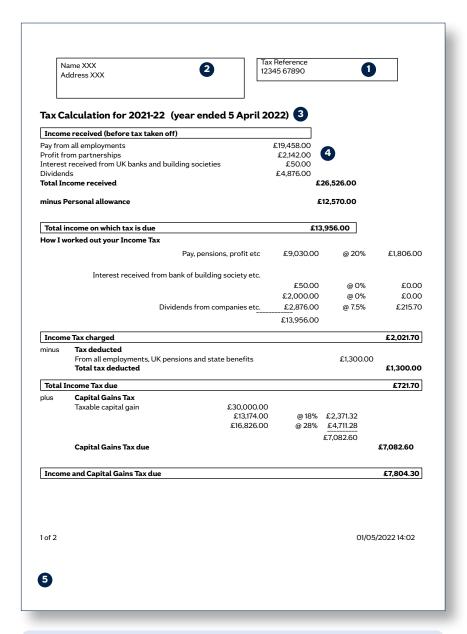
Applicants who submit their return by post will not receive a Tax Year Overview.

For example, where tax calculations for 2020/21 and 2021/22 are provided, you also now need the tax year overviews for the tax years ending 05 April 2020 and 2021.

Get in touch

For more information about our evidence requirements, visit nationwide-intermediary.co.uk/hmrc

Commercial Software Tax Calculation – This can only be accepted in conjunction with the HMRC Online Tax Year overview



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- The Unique Tax Reference number must be shown.
- 2 The customer's name must be shown.
- 3 The tax year must be shown.
- 4 Income from the relevant income stream to be taken from here.
- 5 All pages must be received.

For self-employed applicants who self-assess online, you must obtain the corresponding two years' tax year overviews in addition to the latest two years' Tax Calculations.

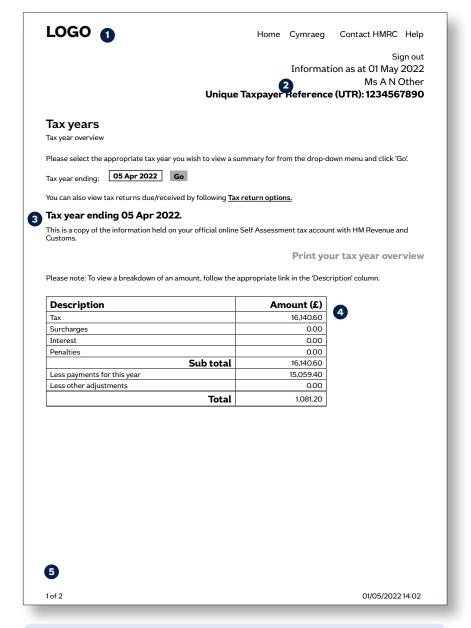
Applicants who submit their return by post will not receive a Tax Year Overview.

For example, where tax calculations for 2020/21 and 2021/22 are provided, you also need the tax year overviews for the tax years ending 05 April 2021 and 2022.

NB – Commercial Software Tax Calculations don't show the GOV.UK logo and may also be referred to as tax computations.

This is an example of a commercial software tax calculation. There are several other versions, but they must include the same information.

Online HMRC Tax Year overview



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- 1 The GOV.UK logo must be shown.
- 2 The Unique Tax Reference and customer's name must be shown.
- 3 The statement 'This is a copy of the information held on your official online self-assessment tax account with HMRC' must be visible.
- 4 How much tax is due and has been paid for the tax year must be shown.
- 5 All pages must be received.

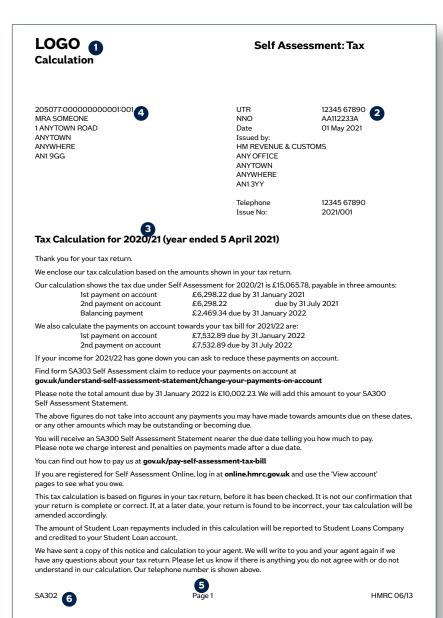
For self-employed applicants who self-assess online, you must obtain the corresponding two years' tax year overviews in addition to the latest two years' Tax Calculations.

Applicants who submit their return by post will not receive a Tax Year Overview.

For example, where tax calculations for 2020/21 and 2021/22 are provided, you also now need the tax year overviews for the tax years ending 05 April 2020 and 2022.

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HMRC postal SA302 Self Assessment Tax Calculation



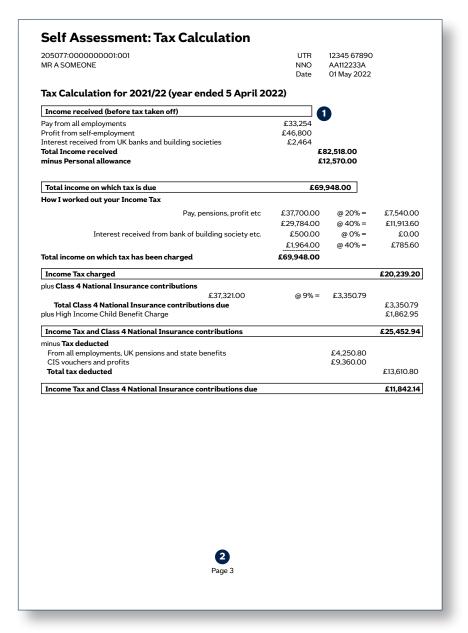
If you need to provide any additional information to help progress your case, please upload a separate document or call us on 0345 730 20 11

- 1 The HMRC logo must be shown.
- 2 The Unique Tax Reference number must be shown.
- 3 The tax year must be shown.
- 4 The customer's name and address must be shown.
- 5 The customer may not always receive a page 2, but will always receive pages 1 and 3.
- 6 The form must show SA302 on it.

Applicants who submit their return by post will not receive a Tax Year Overview.

All figures used are for illustrative purposes only

HMRC postal SA302 Self Assessment Tax Calculation



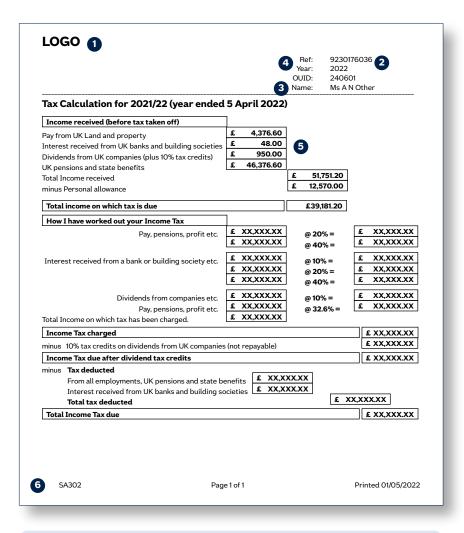
If you need to provide any additional information to help progress your case, please upload a separate document or call us on 0345 730 20 11

- 1 Income from the relevant income stream to be taken from here.
- 2 The customer may not always receive a page 2, but will always receive pages 1 and 3.

Applicants who submit their return by post will not receive a Tax Year Overview.

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HMRC Contact Centre SA302. Self Assessment Tax Calculation



If you need to provide any additional information to help progress your case, please upload a separate document or call us on 0345 730 20 11

- 1 The GOV.UK logo must be shown.
- 2 The Unique Tax Reference number must be shown.
- 3 The customer's name must be shown.
- 4 The tax year must be shown.
- 5 Income from the relevant income stream to be taken from here.
- 6 The form must show SA302 on it.

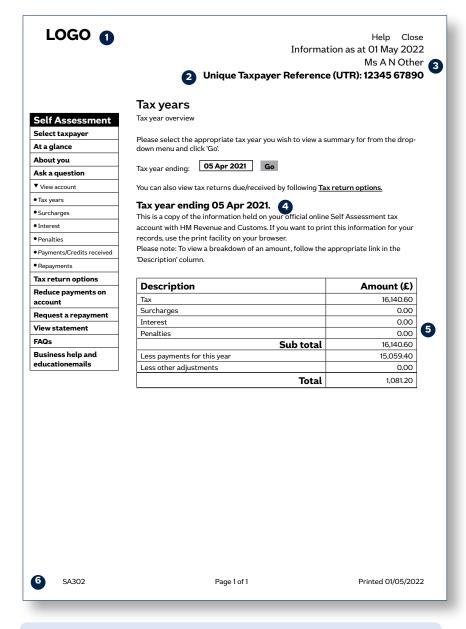
For self-employed applicants who self-assess online, you must obtain the corresponding two years' tax year overviews in addition to the latest two years' Tax Calculations.

Applicants who submit their return by post will not receive a Tax Year Overview.

For example, where tax calculations for 2020/21 and 2021/22 are provided, you also now need the tax year overviews for the tax years ending 05 April 2021 and 2022.

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Tax year Overview



If you need to provide any additional information to help progress your case, please upload a separate document or call us on 0345 730 20 11

- 1 The GOV.UK logo must be shown.
- 2 The Unique Tax Reference number must be shown.
- 3 The customer's name must be shown.
- 4 The statement 'This is a copy of the information held on your official online self-assessment tax account with HM Revenue & Customs' must be visible.
- **5** How much tax is due and has been paid for the tax year.
- 6 The form must show SA302 on it.

For self-employed applicants who self-assess online, you must obtain the corresponding two years' tax year overviews in addition to the latest two years' Tax Calculations.

Applicants who submit their return by post will not receive a Tax Year Overview.

For example, where tax calculations for 2020/21 and 2021/22 are provided, you also now need the tax year overviews for the tax years ending 05 April 2021 and 2022.

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