



To download your Tax Year Overview from the HMRC website, please follow these steps:

1. Go to the HMRC website at [www.gov.uk/government/organisations/hm-revenue-customs](http://www.gov.uk/government/organisations/hm-revenue-customs)
2. Log in to your HMRC account. If you don't have one, you will need to create one.
3. Once you have logged in, click on the "Self Assessment" button.
4. Select the relevant tax year that you require the overview for.
5. Scroll down to the "Tax Return Options" section and click on the "View Your Tax Return" link.
6. Select the "View Return" option.
7. Scroll down to the "Tax Calculation Summary" section and click on the "View Your Tax Calculation" link.
8. Scroll down to the bottom of the page and click on the "View and Print Your Tax Year Overview" button.
9. Your Tax Year Overview will be displayed on the screen. You can download it by clicking on the "Download" button.
10. If you need a paper copy, you can print the overview by clicking on the "Print" button.

Note: Your Tax Year Overview shows the amount of tax you have paid and the income you have received during the tax year. It is an important document and may be required for various reasons, such as applying for a mortgage or a loan.



The below diagram, shows how a perfect example of how a 'Tax Year Overview' should look. It will include your name and Unique Taxpayer Reference (UT) as shown below. This is not to be confused with your annual Tax Year Calculation (SA302).

**A couple of House Rules:**

- Do not send photo's of screens
- Do not send half of the document/or close up of some brief figures, it is the full document we require as PDF or a Full Scan of an Original Printed Version.
- Do not provide or suggest providing any false documentation, any attempts will be reported Immediately.



Information as at 05 Jul 2021

NAME APPEARS HERE

Unique Taxpayer Reference (UTR):

GOES HERE

# Tax years

## Tax year overview

### Tax year ending 05 Apr 2020.

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 appropriate link in the 'Description' column.

 Description	Amount (£)
<a href="#">Tax</a>	769.28
Surcharges	0.00
Interest	0.00
Penalties	0.00
<b>Sub total</b>	<b>769.28</b>
<a href="#">Less payments for this year</a>	769.28
Less other adjustments	0.00
<b>Total</b>	<b>0.00</b>