



Chorley Building Society Underwriting Requirements

If you are submitting a mortgage application to us for a self-employed customer, we verify their income using their tax calculations. When you submit your customer's application, we require Tax Calculation and Tax Year Overview documents covering the last 2 years. These documents are as follows:



Tax Calculation	Tax Year Overview
<p>Latest 2 years from either:</p> <ul style="list-style-type: none"> • SA302 Online Account • SA302 Posted Document • Tax Computation (Online commercial software) 	<p>Latest 2 years:</p> <ul style="list-style-type: none"> • Online/Posted Document



Online

Applicants who use online self-assessment, are able to print their SA302 and Tax Year Overview directly from their online account. They should log into their online HMRC account where they will be able to access and download their last 4 years tax calculations.

See below for instructions of how your customer can access their online account.



Tax Computations (Commercial Software)

Applicants who use an accountant or commercial software to submit their self-assessment are able to access and download their latest 4 years tax calculations from this software. They will need to access their HMRC online account to print off their tax overview.

Intermediaries should ensure the Tax Computations contain the applicant/s full name/s and Unique Tax Reference (UTR) corresponding to the Tax Year Overview.



By Post and Phone

Applicants who are unable to access online, or who submit their self-assessment via post are able to contact the HMRC by telephone and request posted copies of up to their last 4 years tax calculations.

All contact details for the HMRC can be found at the www.hmrc.gov.uk website.

A snapshot of how to print Tax Calculation documents

The most efficient option to obtain a Tax Calculation (SA302) is to print a copy. Customers can do this from either their HMRC Self-Assessment Online account using the following steps:

Log on to your online account via online.hmrc.gov.uk

Choose **Self-Assessment**

Select **View your Tax Return**

Select **Tax Return Options**

Select the desired year from the drop-down menu and click **Go**

Click **View Return** button

Select **View Calculation**

Select **View and Print your Calculation**

Select the link at the bottom of the page **Print your full calculation**



A snapshot of how to print Tax Year Overviews

The most efficient option to obtain a Tax Year Overview is from their HMRC online account using the following steps:

Log on to your online account via online.hmrc.gov.uk

Choose **Self-Assessment**

Select **Self Assessment Overview**

Select **View Account**

Select the desired year from the drop down menu and click **Go**

Select **Print your Tax Year Overview**

Select the link at the bottom of the page **Print your full calculation**