

Official use only

Date Stamp

Name and address

Postcode

Your reference number

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Date of issue

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Notes

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Self-employed Income Information Form

We need information about your self-employed work and your income from it to work out your Housing Benefit and Council Tax Support. You should fill in a separate form for each type of self-employed work, so you may need more forms if you have more than one business or do more than one type of work. Call us if you need more forms.

We suggest you read through the form and collect all the information you need before you start to fill it in. You might need to speak to your book-keeper, accountant or professional advisor if your financial affairs are complicated. Citizens Advice can provide free confidential help and advice if you need it. (Phone 0344 4994199 or online www.citizensadvice.org.uk)

You should fill in this form in black or blue pen. Many of the questions ask for a 'Yes' or 'No' answer. If we need more information or proof, we tell you what we need next to the answer you have given.

We will need to see your latest profit-and-loss account for each type of self-employed work and business income. If you do not have these, we will need information about your trading to the current date, and estimates for the future.

We will use the information you give us to work out your income from self-employed work, and to estimate your future income for benefit purposes. We need detailed information and proof so we can work this out accurately, and to prevent fraud.

Do not delay returning this form as you may lose benefit. You should tell us if it will take more than a calendar month to return it to us, otherwise we will terminate your benefit claim.

Section 1 Your self-employed work

1. What sort of self-employed work do you do?

2. What is the name of the business?

3. When did you start this business or this type of self-employed work?

/ /

4. How many hours do you normally work each week?

hours

5. Is your work in a business partnership?

No

Yes

Tell us the names of each partner and their share in the business.

Name	Share
	%
	%
	%
	%
	%
	%

6. Do you have a partner that you live with? (This includes a person you are married to or have a civil partnership with, or someone you live with as if they were your husband, wife or civil partner)

No

Yes

Are you paying your partner a wage from the business or self-employment?

No

Yes

How much do you pay?

£

every

7. Do you work from home?

No Tell us your business address

Yes

Postcode:

Partly Tell us how much time you spend working from home, the other addresses you use for work and how much of your work time you spend at customers' addresses.

8. How many people work for you?

Full time workers (over 30 hours a week)

People

Part-time workers (under 30 hours a week)

People

Workers who are on temporary or casual contracts

People

9. Does the amount of money that goes in and out of your business change a great deal at different times of the year? For example, an ice-cream seller may sell more in the summer, or a farmer may have more income after harvest.

No

Yes Please give details.

10. Has your self-employed business changed in the last 12 months?

For example, has a new business partner recently joined or left the business, have you employed more or fewer people, or has the type of self-employed work or the hours you work changed?

No

Yes Tell us here when it changed and what changed.

*When did the change happen?

/ /

Details of the change

11. Are there any loans, hire-purchases agreements or other debts for your business or self-employed work?

No

Yes Please give details here and let us see the loan agreements or statements.

Amount	Date of the loan or agreement	What the loan is for	Name of the company or person you owe	Interest payment	Capital payment	Period of the loan	Have you provided proof
£	/ /			£ every	£ every		Yes <input type="checkbox"/> No <input type="checkbox"/>
£	/ /			£ every	£ every		Yes <input type="checkbox"/> No <input type="checkbox"/>
£	/ /			£ every	£ every		Yes <input type="checkbox"/> No <input type="checkbox"/>
£	/ /			£ every	£ every		Yes <input type="checkbox"/> No <input type="checkbox"/>

12. Do you hold a National Insurance exemption certificate?

No When do you expect to receive it? / / Not required

Yes Please let us see it. Is it: enclosed? to follow?

13. Do you pay class 2 National Insurance contributions?

No

Yes How much do you pay? £ each

14. Do you have your latest income tax assessment from the Inland Revenue?

No When do you expect to receive it? / /

Yes Please let us see it. Is it: enclosed? to follow?

15. Are you registered for VAT?

No

Yes How much have you paid to HMRC?

£ for the period from / / to / /

How much have you received from HMRC?

£ for the period from / / to / /

Please let us see the VAT statements from HMRC.

Are they: enclosed? to follow?

16. Do you pay into a pension scheme?

No

Yes

Name of the pension company:			
How much do you pay and how often?	£		every
How do you pay your pension contributions? (For example, by cash, cheque, direct debit, standing order.)			
When did you start paying into a pension scheme?		/	/
We need to see proof of the payments you are making. What proof have you provided?			
Letter from pension company	<input type="checkbox"/>		
Pension statement	<input type="checkbox"/>		
Bank statements	<input type="checkbox"/>		
Other (describe it here)	<input type="checkbox"/>	<input type="text"/>	

17. Do you have a bank or building society account you use for the business or self-employed work?

No

Yes

Who is it with?			
Whose name is the account in?			
Sort code:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account number:	<input type="text"/>		
What is the balance in the account?	£		as at / /
We need to see the last three months' statements.	Are they: enclosed?	<input type="checkbox"/>	to follow? <input type="checkbox"/>

18. Are you receiving any business grants or subsidies?

No

Yes

Who is the grant from?			
How much is the grant?	£		every

We need to see proof, such as a letter from the payer. Is it: enclosed? to follow?

When will the grant end?		/	/
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Section 2 Profit-and-loss accounts

1. In which month is your business's financial year end?

Month:

2. Do you have a profit-and-loss account for your business's last year end?

Yes

Go to question 3 below.

No - I haven't been in business long enough yet

Go to section 4 after next page.

No - my accounts are with my accountant

Go to question 4 below.

No - I don't have any

Go to question 5 below.

3. Do you expect the figures shown on your accounts to change in the next year's accounts?

No

Go to section 3 on the next page

Yes

Give details

As the figures on your account are expected to change, please fill in both section 3 about the account and section 4 about your current trading.

4. When are your accounts likely to be ready?

Who is your accountant?

Name:

Address:

Phone:

Can we contact them to discuss your accounts?

No

Go to section 4

Yes

Go to section 4

5. Why are no profit-and-loss accounts available?

Do you expect to have some accounts in the future?

No

Yes

When?

/ /

Go to section 4

Section 3 About your profit-and-loss account

Proof we need to see

If you can provide a profit-and-loss account please provide it with this form and answer the following questions.

Is your account: enclosed? to follow?

1. What period does your profit-and-loss account cover?

From: / /

To: / /

2. Are all the expenses shown in the account for business use only?

For example, if you use the same phone line for work and private calls, have you reduced the total expense to only include the business use? If you haven't reduced it, tell us how much is for private use.

Yes

No Give details

Type of expense	Total amount	What percentage is for private use?
	£	%
	£	%
	£	%
	£	%

3. Did you take any goods from the business free of charge for your own use or your family's use in the period the account covers?

No

Yes How much were the goods worth in total (valued at cost) in the period the account covers? £

4. If your account shows entries for 'sundries' or 'general expenses', please tell us what these are for?

Type of expense on account	Total Amount	Explanation
	£	
	£	
	£	
	£	

5. What is the name and address of the person who prepared your account?

Name:	
Address:	
Phone number:	

6. Can we contact this person about your account if we have any questions?

No Yes

Go to section 5

Section 4 Income and expenses from self-employed work

You will need to fill in this section if at least one of the following applies to you.

- You do not have a profit-and-loss account.
- You only started self-employed work in the last 12 months.
- You do not have a profit-and-loss account for the last financial year.
- Your profit-and-loss account does not take into account major changes that will affect your income and expenses in this business financial year.

Fill in this statement of income and expenses for at least a full six-month period. If you have not been trading this long, give the actual amounts for the period since your self-employed work started and estimate the income and expenses for the rest of the six-month period.

If you have been trading for more than six months, then you should tell us the actual income and expenses for actual period of trading up to 12 months. You do not need to give estimates.

Proof we need to see

We will need to see original proof of your income and expenses for your self-employed work. The items you can provide include the following.

- Bank and building society statements
- Day books or financial records
- Chequebook stubs
- Income tax and VAT returns
- Invoices and receipts
- Other business records and accounts

If you need us to return your proof to you very quickly so you can carry on running your business, please tell us.

Is the proof we have asked to see: enclosed? to follow

1. What period are you giving us details of your income and expenses for?

Actual income and expenses:	/	/	to	/	/
Estimated income and expenses:	/	/	to	/	/

2. Income

Type of income	Actual	Estimated
Money from sales or takings (including tips)	£	£
Commision or royalties	£	£
Enterprise allowance, Business Start-up Grant, Princes Trust Grant and any other grants and subsidies.	£	£
Rent and income from investments or other assts	£	£
VAT Refunds	£	£
Insurance payments	£	£
Other income (please describe it here)	£	£

3. Expenses

Tell us about your actual and estimated expenses for you self-employed work or business for the periods you are telling us about.

Some expenses might be mixed up with personal or private use so you should tell us how much of the total expense is for personal or private use. For example, if the phone bill is £100 but £60 is for private use, you should write 60% in the last column.

Type of expense	Actual expense	Estimated expense	What percentage is for private use?
Wages to wife, husband or partner	£	£	%
Wages to employees (including employer's National Insurance)	£	£	%
Your wages and drawings	£	£	%
Rent - give the address	£	£	%
Mortgage interest payments - give the address	£	£	%
Business Rates	£	£	%
Cost of stock materials for selling or using in production	£	£	%
Stock insurance and business insurance	£	£	%
Cost of equipment, fixtures and fittings	£	£	%
Replacing small tools	£	£	%
Electricity	£	£	%
Gas	£	£	%
Heating Oil	£	£	%
Other fuels (not motoring expenses)	£	£	%
Water rates	£	£	%
Phone	£	£	%
Mobile phone	£	£	%
Accountancy fees	£	£	%
Legal fees	£	£	%
Advertising	£	£	%
Postage	£	£	%
Printing	£	£	%
Stationery	£	£	%
Bank and building society account fees	£	£	%
Leasing and hire costs (not vehicles)	£	£	%
Business entertainment	£	£	%
Bad debts	£	£	%

Motoring and other expenses are combined on the next two pages.

4. Motor vehicle expenses

Tell us about the vehicles you own or use for your self-employed work or business, and your motoring expenses for the periods shown at the start of this section. If you have changed a vehicle please record the old and new vehicle details.

Do you or does your business use any vehicles for self-employed work or business?

No Go to the next page

Yes Tell us about them here

		Vehicle 1	Vehicle 2	Vehicle 3	Vehicle 4	Vehicle 5
Make of vehicle, for example, Vauxhall						
Type of vehicle, for example, Corsa 1.2 van						
Registration number						
Who owns the vehicle? (You, your business, your partner or is it leased?)		miles	miles	miles	miles	miles
What is the total average monthly mileage for the vehicle?		miles	miles	miles	miles	miles
What is the total average monthly mileage on work or business which is included in the total above?		miles	miles	miles	miles	miles
Loan Interest or leasing costs for the vehicle (say how often these are due)		£ each	£ each	£ each	£ each	£ each
When did you or the business get the vehicle?		/ /	/ /	/ /	/ /	/ /
When was the vehicle given up, sold or got rid of?		/ /	/ /	/ /	/ /	/ /
When is the motor insurance due?		/ /	/ /	/ /	/ /	/ /
How much is the motor insurance?		£	£	£	£	£
What period does the insurance cover?	From	/ /	/ /	/ /	/ /	/ /
	To	/ /	/ /	/ /	/ /	/ /
Cost of car tax		£	£	£	£	£
What period is the car tax for? (6 months or 12 months)						
When is the car tax due?						
Fuel Costs		£	£	£	£	£
What period do these fuel costs cover?	From	/ /	/ /	/ /	/ /	/ /
	To	/ /	/ /	/ /	/ /	/ /
Servicing and repairs expenses		£	£	£	£	£
What period are these costs for?						

5. Motor expenses

What are the total motoring expenses for the actual and estimated periods you gave at the start of section 4? Tell us the percentage of the total expense which is for personal or private use.

Type of expense	Actual	Estimated	What percentage is for private use?
Fuel	£	£	%
Road tax	£	£	%
Motor insurance	£	£	%
Cleaning	£	£	%
Servicing and repairs	£	£	%
Interest on vehicle loans and hire purchase	£	£	%
Vehicle leasing	£	£	%

6. Any other self-employed work expenses

Use this space to tell us about any other work-related expenses you have not listed before from the periods you are telling us about. This includes items like training, uniforms, cleaning materials, subscriptions, rail fares, and internet fees.

Tell us the percentage of the total expense which is for personal or private use.

Type of expense	Actual	Estimated	What percentage is for private use?
	£	£	%
	£	£	%
	£	£	%
	£	£	%
	£	£	%
	£	£	%
	£	£	%

7. What was the value (at cost) of the opening and closing stock for the business at the start and end of the period you are telling us about?

Opening stock value	£
Closing stock value	£

8. Did you take any goods or produce from the business free of charge for your own use or your family's use in the period you are telling us about?

No

Yes How much were the goods worth in total (valued at cost) in the period you are telling us about?

£

Go to section 5

Section 5 Declaration

1. Have there been any periods in the last 12 months where you have been unable to work and your business was unable to trade?

No Go to question 2 below

Yes Tell us about them here

Dates		Why were you unable to trade?
from	to	

2. Is there any other information about your self-employment or business you want to give us? For example, the business is closing down, there is new competition in the area, or the profit or loss in previous periods will change for some reason.

No Read the declaration at the bottom of this page and sign in the space provided

Yes Tell us about it below, then read the declaration and sign in the space provided

Attach another piece of paper if you need more space.

Please read this declaration carefully before you sign and date it.
Remember that you may be prosecuted if you make a false declaration.

I understand the following.

- If I give information that is incorrect or incomplete, you may take action against me.
- You will use the information I have provided to process my claim for Discretionary Housing Payments, Housing Benefit and Council Tax Support. You may check the information with other departments within the council and other councils. You may also need to contact my representative or professional advisors, if I have any, to check the information.
- You may use any information I have provided in connection with this and any other claim for social security benefit that I have made or may make. You may give some information to other government organisations if the law allows this.

I know I must let you know if the information I have given changes, for example, my work changes, or the trading profit and loss changes.

The information I have given is correct and complete.

Your signature:

Date: / /