



**Housing Benefit and Council Tax Support
Self-Employed Income and Expenses Form**

Claim number:

Name :

Address:

Section 1 - About your business

Name of business:

Business address:

Do you have a website?
If so please give details:

What kind of work do you do?

Date business started trading:

Date your current financial year started:

Average number of hours you work each week?

Is your business a partnership?
(Please tick one box) Yes No

If yes, what percentage of the business belongs to you?
Please provide your partnership agreement.

Do you use part of your own home for business purposes?
(Please tick one box) Yes No

If yes, please give details

Section 2 - Employees

Do you employ any staff?

Yes

No

If yes, how many staff do you employ?

Does this include your husband, wife or partner?

Yes

No

If yes, what are his / her earnings?

£

Section 3 - About your business income

Do you have any accounts prepared by your accountant (audited or otherwise) for the last financial year?

Yes

Please send the original accounts with this form

No

Please explain why you do not have any accounts and say when you expect to have them in the box below:

Do you have your latest SA302 form from HMRC?

Yes

Please send your SA302 with this form.

No

Please explain why, and provide the date you expect to receive it in the box below:

Do you have a business bank account?

Yes

Please send your last 6 months bank statements with this form.

No

Section 4 - Other outgoings

Do you pay into a personal pension scheme?

Yes

Please provide documentary proof of the scheme to which you belong and proof of recent payments made.

No

Section 5 - Your gross profit

Fill in Sections 5 and 6 only if you do not have any accounts prepared by a qualified accountant for the last financial year or if you have not been trading for a full year.

Please tell me the exact period that the figures in the table below cover. (This should be your last financial year or, if you have not been trading for a year it should be the date your business started to the current date)

From to

Income	£
Your turnover (sales, takings , income)	
Plus grants i.e. Enterprise Allowance	
Plus VAT refunded	
Plus closing stock	
Total income	
Less cost of sales (your stock purchases)	
Less VAT paid out	
Less opening stock	
Gross profit	

Section 6 - Your expenses

Please give the outgoings of your business during the period shown in Section 5 - Your Gross Profit overleaf. Please note some expenses are not allowable under Council Tax Support and Housing Benefit Regulations.

You may be required to provide proof of any expenses listed below. I will write to you if I require proof. Original documents will be required, photocopies are not acceptable. All documents requested must be provided in a file and arranged into the type of expense and in date order or they will be returned to you to do this, which will delay your claim. Any expenses declared for which no documentary proof is provided when requested may not be allowed as an expense in the calculation of your net profit.

Expenses	Total amount spent	Amount included for non- business use
Heating and lighting	£	£
Cleaning	£	£
Telephone	£	£
Drawings (Cash or Stock)	£	£
Wages - paid to you	£	£
Wages - paid to your wife/ husband or partner	£	£
Wages - paid to others	£	£
Rent (for business premises or proportion of your home rent attributed to business use)	£	£
Business rates	£	£
Advertising	£	£
Printing, stationery and postage	£	£
Internet access / broadband	£	£
Business insurance (not motor)	£	£
Accountants charges	£	£
Business entertainment	£	£
Bank charges on a business account	£	£
Interest payments on business loan (Please enclose the loan agreement)	£	£
Loan repayments	£	£
Capital Expenditure	£	£

Expenses	Total amount spent	Amount included for non- business use
Leasing charges	£	£
Proven bad debts ((Please provide documentary evidence)	£	£
Total	£	£

Repair or replacement of business assets

What was repaired or replaced?

How much did this cost?

£

Was it covered by insurance?

Yes

No

Motoring expenses

Expenses	Total amount	Percentage for business use
Road tax	£	%
Insurance	£	%
Repairs	£	%
Petrol or diesel	£	%
Vehicle lease or hire	£	%
Total	£	

Who owns the vehicle(s)?

Self

Business

Is/are the vehicles(s) used solely for business purposes?

Yes

No

If NO what proportion of the total mileage is for business use?

%

What is your total annual mileage?

What is your annual business mileage?

Other expenses

In the table below, list any other business expenses that you have not already told us about on this form:

Details	Total amount	Percentage for business use
	£	%
	£	%
	£	%
	£	%
	£	%

Section 7 - Future turnover

Do you expect your trading figures for the next six months to be similar to those given above?

Yes

No

Use the space below to explain any difference in future turnover or to provide any other information that you feel may be relevant to your claim.

Section 8 - Declaration

Please read this declaration carefully before you sign and date it.

I understand the following:

- If I give information that is incorrect or incomplete, you may take action against me. This may include court action.
- You will use the information I have provided to process my claim for Housing Benefit, Council Tax Support or both. You may check some of the information with other sources within the Council, the rent service and other Councils.
- You may use any information I have provided in connection with this and any other claim for Social Security benefits that I have made or may make. You may give some information to other organizations, such as government departments, local authorities and private-sector companies such as banks and organizations that may lend me money, if the law allows this.
- I have read, or had read to me, and understand the information on this form.

I **know** I must let the Council know immediately about any changes in my circumstances, which might affect my claim.

I **declare** the information I have given on this form is correct and complete.

Signature

Date

Email Address:

Daytime Phone number:

Please return your completed form by either:

- **Sending to Stockport Council, Benefits Team, Town Hall, Stockport, SK1 3XE**
- **Or email to: benefits@stockport.gov.uk quoting your claim number in the subject field**

If you are unsure of what documentation you need or want to ask us anything about your claim please contact us online at **www.stockport.gov.uk/bencontactus**

You may need to provide original documents as proof of your income and spending.

Please make sure that you keep any relevant:

- bank or building society statements (business and personal accounts);
- income tax assessments;
- invoices and receipts;
- day books; and
- any other records relevant to your business.

We will contact you if we need this information

Guidance notes for the Self-Employed Income and Expenses Form

Section 1 – About your business

Please give a description of your business as this will help us to assess whether the expenses declared on the form are relevant and reasonable for your business.

If you use your home for business purposes please give details. Please state whether you have a room that is used exclusively for the business and the average amount of time you spend working at home per week.

Section 2 – Employees

Please ensure that if your partner is employed by the business that you give details of their earnings as these will be taken into account when calculating your household income.

Section 3 – About your business income

If you have accounts prepared by an accountant for the last financial year, these will usually be used to calculate your income for your benefit claim and you will not need to complete sections 5 or 6.

If your accounts for the last financial year are unavailable, please ensure that you explain on the form when the accounts will be available as this will enable us to review your income when the accounts are ready.

Section 5 – Your gross profit

The amount for turnover includes the amount of any sales, takings and any other income, include tips and commission.

The amount for cost of sales includes items such as stock and materials.

Section 6 – Your expenses

We can only take into account reasonable expenses incurred in running your business. If any of the amounts spent include personal use you must give a breakdown. For example if you use your telephone for personal calls, please give the total amount you have spent and the amount spent on personal calls.

Only include loans that you have taken out for your business. Please note that we may only be able to take the interest element of your loan as an allowable expense, therefore it is important to provide the loan agreement.

Taxi Drivers – Please provide your last two MOT (VOSA Test) certificates which will confirm your annual mileage.

Child minders – Do not need to provide proof of expenses as we do not take these into account, instead we will disregard two thirds of the gross profit.

Company Directors – Please provide your last two months payslips or an earnings certificate completed by the company secretary and your most recent company accounts showing the Directors Remuneration.

More than 1 self-employed business – You will need to complete a separate form for each business.



Examples of proofs you may be asked to provide for Self-Employed Housing Benefit and Council Tax Support claims

Item of Income and Expenditure	Possible proof
Sales, Receipts, Takings	Day books, sales ledger, accounts
VAT received	Remittance advise and VAT registration number
Other income into business	Receipts, vouchers, invoices, accounts
Business purchases, VAT paid out, wages, rent, Business Rates, Utilities, telephone, motor costs, professional fees, insurance	Receipts, vouchers, invoices, accounts, utility bills, tenancy agreement
Business bank account charges	Business bank account statements
Business Loans	Loan agreement with repayment terms
Car hire or lease	Lease agreement
Vehicle insurance	Policy documents

If documents are requested you must provide originals, photocopies are not acceptable.

All documents must be provided in a file and arranged into the type of expense and in date order or they will be returned to you to do this, which will delay your claim.

Any expenses declared for which no documentary proof is provided when requested may not be allowed as an expense in the calculation of your net profit.

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If you have any queries please contact us on-line at:
www.stockport.gov.uk/bencontactus