



SELF EMPLOYED INCOME AND EXPENDITURE FORM

IMPORTANT NOTES - PLEASE READ

You should not complete this form if you are a paid director of the company.

You will need to provide details of your income that covers the last 3 months trading.

If you have been trading for less than 3 months, please provide details from the business start date to the present time.

If you are asked a YES or NO question, please tick the box that applies to you and follow instructions about which question you should proceed to.

ABOUT YOU

What is your name?

What is your home address?

Postcode

Benefit/CTR
Case Ref:

Phone Number

ABOUT YOUR BUSINESS

1. Name of Business

2. Address of Business

3. Date business began

4. Business Telephone Number

5. What is the nature of your business?

6. Do you have professionally prepared accounts (audited or otherwise) for the last financial year?

Yes Please provide accounts

No

ABOUT YOUR BUSINESS Continued ...

7. Are you registered for VAT?

Yes Please answer the questions below

No Go to question 8

Please confirm your V.A.T. number

How much V.A.T. have you paid to H.M. Customs and Excise?

How much V.A.T. have you received from H.M. Customs and Excise?

8. Is your business a partnership?

Yes Please answer the questions below

No Go to question 9

What % of the total profit / loss is yours? %

please provide partnership agreement

If your Husband/Wife is a partner in the business, what percentage of the profit / loss is theirs? %

MONEY COMING IN TO THE BUSINESS

9. Have you received any money from a business start-up scheme?

Yes Please answer the questions below

No Go to question 10

Please state the name of the scheme, the amount you received and the period you were on it

Name of Scheme

From To Total Amount Received

10. Are you in receipt of Tax Credits or are you waiting to hear about a Tax Credit claim that you have made?

Yes, I receive Tax Credits - Please provide your award letter

Yes, I have made a claim for Tax Credits and am waiting to hear - Please tell us once you hear

No, I do not receive Tax Credits and have no claim outstanding

11. On average, how many hours do you work each week? hours

12. Accounting period (Please enter dates for the last 3 months trading. If you have been trading for less than 3 months, please use the start date of the business to present)

From To

MONEY COMING IN TO THE BUSINESS continued ...

13. Please complete the information below using figures for the accounting period specified above

Sales, takings, receipts	£	
Other income	£	Please tell us what this is
Cash or capital put into the business in this accounting period	£	Please tell us the source of the cash or capital
Total	£	

£

15. If applicable, what was the value of your stock at the end of your trading period?

£

16. During the last 3 months trading have there been any periods of sickness / holiday when your income has been nil?

Yes Please list the dates and reason for this below

No Go to question 17

17. Have you been trading for more than 3 months?

Yes Go to question 18

No Go to question 19

18. Please advise if it is reasonable to assume that the trading figures for the next 3 months will be similar to those quoted above.

Yes Go to question 20

No Please answer the question below

Please explain the reasons for the likely difference in your trading figures for the next 3 months

MONEY COMING IN TO THE BUSINESS Continued ...

19. Please estimate your income for the next 3 months (you may find this information on your business plan if you have one)

On average, how many hours a week do you expect to work? hours

Sales, takings, receipts £

Other income £

Please tell us what this may be

Total £

MONEY GOING OUT

20. Do you employ any staff?

Yes Please answer the questions below **No** Go to question 21

How many people do you employ?

Please give full names of your employees below and the amount they are paid each week.

Employees Name	<input type="text"/>	amount	<input type="text"/> £
Employees Name	<input type="text"/>	amount	<input type="text"/> £
Employees Name	<input type="text"/>	amount	<input type="text"/> £

21. Do you have business premises or use part of your home for business purposes?

Yes Please answer the questions below **No** Go to question 22

Please complete the following expenses information. If you use part of your home for business premises you will need to estimate how much of the cost goes towards the business. **Do not** include amounts which are for your own personal use

Rent / mortgage (business use only)	<input type="text"/> £	* Per week / month / year
Heating & Lighting	<input type="text"/> £	* Per week / month / year
Telephone	<input type="text"/> £	* Per week / month / year
Cleaning	<input type="text"/> £	* Per week / month / year
Business Rates	<input type="text"/> £	* Per week / month / year

* Please delete as appropriate.

MONEY GOING OUT Continued ...

22. Do you use your vehicle for business purposes?

Yes Please answer the questions below No Go to question 23

Please complete the following motor expenses information, estimating how much of the cost goes towards the business. **Do not** include amounts which are for your own personal use

Road Tax	<input type="text" value="£"/>	* Per week / month / year
Insurance	<input type="text" value="£"/>	* Per week / month / year
Fuel	<input type="text" value="£"/>	* Per week / month / year
Repairs	<input type="text" value="£"/>	* Per week / month / year
Car Lease	<input type="text" value="£"/>	* Per week / month / year

23. Please detail your regular **outgoings** – if you have been trading less than 3 months or have answered **No** to question 18, please estimate your regular outgoings for the next 3 months

Accountancy	<input type="text" value="£"/>	* Per week / month / year
Business overdraft	<input type="text" value="£"/>	* Per week / month / year
(do not include interest / loans or your own personal overdraft)		
Advertising	<input type="text" value="£"/>	* Per week / month / year
Purchase of goods or materials	<input type="text" value="£"/>	* Per week / month / year
Bank Charges	<input type="text" value="£"/>	* Per week / month / year
Business insurance	<input type="text" value="£"/>	* Per week / month / year
(State what it covers)		<input type="text"/>
Leasing charges	<input type="text" value="£"/>	* Per week / month / year
(State what is leased)		<input type="text"/>
Travel	<input type="text" value="£"/>	* Per week / month / year
(do not include car expenses and please note that travel to and from business is not allowable expenses)		

MONEY GOING OUT Continued ...

National Insurance contributions

£

* Per week / month / year

(If you do not pay N.I. please provide an exemption certificate)

Proven bad debt

£

* Per week / month / year

(i.e. Insolvency, Bankruptcy, Sequestration, Liquidation etc)

Other

£

* Per week / month / year

State what it is

24. If there have been any **non-regular** outgoings within the accounting period that you have specified above (ie. repair / replacement of a business plan) please detail them in the box below

You may be required to provide proof of the expense items listed in questions 21 to 24. The Council will write to you if this is the case.

25. Is it reasonable to assume the outgoings, listed in question **24**, will be similar for the next 3 months?

Yes Go to question **26**

No Please detail in the box below

LOANS FOR YOUR BUSINESS

26. Have you taken out a loan for your business?

Yes Please answer the questions below **No** Go to question 27

This section is about loans, hire purchase or credit agreements you have taken out FOR YOUR BUSINESS. DO NOT include any loans you have taken out for personal use. We will need to see your loan agreement. When you borrow money, the amount you repay will partly be towards the amount you borrowed (capital) and partly towards the interest charged. WE NEED TO KNOW THESE DETAILS. Your lender can tell you if you do not know, or the details will be on your loan agreement.

First loan

A) Total capital repayment

B) Total interest repayment

What period does the loan cover? From To

What is the loan for?

Second loan

A) Total capital repayment

B) Total interest repayment

What period does the loan cover? From To

What is the loan for?

FURTHER INFORMATION

27. Please use this space to provide further details about the information you have given. Use an additional sheet of A4 paper if necessary.

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
- You will use the information I have provided to process my claim for Housing Benefit / Council Tax Reduction. You may check the information with other sources within the Council, rent offices and other Councils
- You may use the 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 government organisations, if the law allows this

I know I must let the Council know about any changes in my circumstances which may affect my claim.
I declare the information I have given on this form is correct and complete.

Signature of person claiming

Date

Forms filled in by someone other than the person claiming

Please tell us why you are filling in this form for someone else

Name of person who filled in this form

Signature of person

Relationship to person claiming

Please send the completed form to

Sefton Council, PO Box 21, Bootle, Merseyside, L20 3US