

Financial Questionnaire

Reference #	65c09acecf035
Status	Completed
Login Username	Christian TEST TEST Ha TEST TEST TEST
Login Email	management@clearstarttax.com
Last Name	test
First Name	est
Marital Status	Single
Date Of Birth	2024-02-08
SSN#	5345435
Street Address	test
Address line 2	test
City	test
State	test
Zip Code	34534
Rent Or Own (eg. share rent, live with relative, etc.)	test
County Of Residence	test
Primary Phone Number	345345
2nd Contact Phone Number	3453453
Driver License #	test
Do you have any dependents; EXCLUDING yourself and your spouse? (only include dependents that you claim on your tax returns)	have any dependents no
Client Employment Status	Wage Earner
Cash on Hand Amount	333.00
How Many Bank Accounts Do You Have	1
Bank 1	https://client.clearstarttax.com/public/upload/fq/9698181707121358.jpg
Do You Have Any Investments? (Ex: stocks, bonds, mutual funds, IRA, 401 and all other investments/retirement accounts)	No

Can you take a loan against your 401k Account?	No
Do You Have Any Credit Cards?	No
Do You Have Life Insurance? (Life insurance policy with cash value - NOT TERM LIFE)	No
Do You Own Any Real Estate? (Any Real Estate/ Primary Residence/Rental Properties/ Lands Owned)	No
Do You Own A Motor Vehicle?	No
Do You Have Any Other Personal Assets: (recreational vehicles, boats, RV's, artwork, jewelry, collections, etc) NOTE: Do not include clothing, furniture and other personal effects.	No
Interest/Dividends	4.00
Net Self-Employed/Business Income	4.00
Net Rental Income	4.00
Distribution	4.00
Social Security Income	543.00
Alimony Income	34.00
Retirement Income/ Pension	543.00
Other Income	5.00
Total House Hold Income	1141.00
Food, Clothing & Misc	543.00
Rent/Mortgage	3954.00
Utilities	34.00
Vehicles Ownership Costs	53.00
Vehicles Operating Costs	43.00
Public Transportation	3543.00
Health Insurance	5.00
Out of Pocket Health Costs	543.00
Court Ordered Payments	543.00
Child Care	5435.00
Life Insurance	345.00
Taxes (Income & FICA)	4354.00
Other Secure Debts	543.00
Other Secure Debts	5345.00

Total Household Expense	25283.00
Are you the beneficiary of a trust, estate, or life insurance policy?	No
Are you currently in bankruptcy?	No
Have you been party to a lawsuit?	No
In the past 10 years, have you transferred any assets for less than their full value?	No
In the past 3 year, have you transferred any real property (land, house, etc.)?	No
Print Full Name	543534
Date	2024-02-22
Signature	Christian TESTTEST Ha TESTTESTTEST
Last Update	2024-02-05 08:22:38
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