

Financial Questionnaire

Reference #	65c0be01b49e4
Status	Completed
Login Username	Christian TEST TEST Ha TEST TEST TEST
Login Email	management@clearstarttax.com
Last Name	test
First Name	etset
Marital Status	Married
Date Of Birth	2024-02-14
SSN#	4354
Married Filing Status	Married Filing Jointly
Street Address	rtr
Address line 2	dgfg
City	ret
State	erter
Zip Code	53454
Rent Or Own (eg. share rent, live with relative, etc.)	tert
County Of Residence	tgdfgdfg
Primary Phone Number	435345345
2nd Contact Phone Number	43534
Driver License #	tdfg
Do you have any dependents; EXCLUDING yourself and your spouse? (only include dependents that you claim on your tax returns)	have any dependents no
Married Filing Status	Married Filing Jointly
Spouse Information	
First Name	ert
Last Name	rt

Driver's License	rtrte
SSN#	453534
Date Of Birth	2024-02-28
Client Employment Status	Wage Earner
Spouse Employment Information	
Spouse Employment Status	Self-Employed
Self-Employed	
Business Name	hgf
Employee ID # (If any)	h
# of Employees (if any)	5646
Average Monthly Payroll	45
Type of Business (Partnership, LLC, Corporation Other)	try
Frequency of Tax Deposits	gfh
Business Website (if any)	gfhgf
Spouse Employer	
Employer Name	t
Occupation	reter
Employer Address	ret
How Long with this Employer	t
Number of Exemptions claimed on W4	ertret
Spouse Pay Period	Bi-Weekly
Employer	
Employer Name	trt
Occupation	ret
Employer Address	ert
How Long with this Employer	ertr
Number of Exemptions claimed on W4	et
Pay Period	Weekly
Amount	5435

Cash on Hand Amount	543534.00
How Many Bank Accounts Do You Have	1
Bank 1	https://client.clearstarttax.com/public/upload/fq/947531707130369.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
Spouse Asset Information	
Spouse Cash on Hand Amount	543.00
How Many Bank Accounts Spouse Have	1
Spouse Bank 1	https://client.clearstarttax.com/public/upload/fq/5343281707130369.jpg
Interest/Dividends	5.00
Net Self-Employed/Business Income	5.00
Net Rental Income	5.00
Distribution	5.00
Social Security Income	5.00
Alimony Income	55.00
Retirement Income/ Pension	5.00
Other Income	55.00
Spouse Wages	5.00
Spouse Social Security Income	5.00
Total House Hold Income	150.00
Food, Clothing & Misc	4.00
Rent/Mortgage	4.00
Utilities	44.00
Vehicles Ownership Costs	4.00

Vehicles Operating Costs	44.00
Public Transportation	4.00
Health Insurance	4.00
Out of Pocket Health Costs	4.00
Court Ordered Payments	4.00
Child Care	4.00
Life Insurance	4.00
Taxes (Income & FICA)	4.00
Other Secure Debts	4.00
Other Secure Debts	4.00
Total Household Expense	136.00
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	gfdgfdg
Date	2024-02-28
Signature	Christian TESTTESTHa TESTTESTTEST
Last Update	2024-02-05 10:52:49
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