

Financial Questionnaire

Reference #	65d7a829e5e3e
Status	Completed
Login Username	James LaBarge
Login Email	jbarge2222@gmail.com
Last Name	James
First Name	LaBarge
Marital Status	Married
Date Of Birth	1977-04-02
SSN#	032685676
Married Filing Status	Married Filing Separately
Street Address	10 Dolphin Cir
City	Nashua
State	NH
Zip Code	03062
Rent Or Own (eg. share rent, live with relative, etc.)	Rent
County Of Residence	Hillsborough
Primary Phone Number	6036883631
Driver License #	NHL12356352
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 Separately
Client Employment Status	Wage Earner
Cash on Hand Amount	1400.00
How Many Bank Accounts Do You Have	1
Bank 1	https://client.clearstarttax.com/public/
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?	Yes
How Many Motor Vehicles Do You Own?	1

Vehicle 1

Make and Model	
Year	
Mileage	
Lease or Own	
Date Of Purchased/Lease	
Date Of Final Payment	
Current Value	
Current Loan Value	
Monthly Payment	
Name of Lender/Lessor	
Is Vehicle 1 Financed or Leased?	

Vehicle 1 (Upload most recent car note statement)	https://client.clearstarttax.com/public/
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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	0.00
Net Self-Employed/Business Income	0.00
Net Rental Income	0.00
Distribution	0.00
Social Security Income	0.00
Alimony Income	0.00
Retirement Income/ Pension	0.00
Other Income	0.00
Total House Hold Income	105000.00

Food, Clothing & Misc	800.00
Rent/Mortgage	2250.00
Utilities	800.00
Vehicles Ownership Costs	760.00
Vehicles Operating Costs	240.00
Public Transportation	0.00
Health Insurance	0.00
Out of Pocket Health Costs	0.00
Court Ordered Payments	1235.00
Child Care	600.00
Life Insurance	0.00
Taxes (Income & FICA)	0.00
Other Secure Debts	0.00
Other Secure Debts	0.00
Total Household Expense	6685.00
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	James LaBarge
Date	2024-02-22
Signature	<i>James LaBarge</i>
Last Update	2024-02-22 20:01:45
Start Time	2024-02-22 20:01:45
Finish Time	2024-02-22 20:01:45
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