

# Financial Questionnaire

Reference #	65c0c5bd21326
Status	Completed
Login Username	Christian TEST TEST Ha TEST TEST TEST
Login Email	management@clearstarttax.com
Last Name	test
First Name	test
Marital Status	Married
Date Of Birth	2024-02-06
SSN#	4534534
Married Filing Status	Married Filing Jointly
Street Address	dfgdfg
Address line 2	fdgdfgdf
City	gdfg
State	fdgdf
Zip Code	55435
Rent Or Own (eg. share rent, live with relative, etc.)	gdfgfd
County Of Residence	tdfgdfgd
Primary Phone Number	<a href="#">5435435</a>
2nd Contact Phone Number	<a href="#">345435345</a>
Driver License #	fgdfg
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
<b>Spouse Information</b>	
First Name	tet
Last Name	wtw

Driver's License	wetwe
SSN#	564565464
Date Of Birth	2024-02-13
Client Employment Status	Wage Earner
<b>Spouse Employment Information</b>	
Spouse Employment Status	Self-Employed
<b>Self-Employed</b>	
Business Name	t
Employee ID # (If any)	yrt y
# of Employees (if any)	5
Average Monthly Payroll	55
Type of Business (Partnership, LLC, Corporation Other)	yty
Frequency of Tax Deposits	hgfh
Business Website (if any)	gf
<b>Spouse Employer</b>	
Employer Name	ty
Occupation	try
Employer Address	try
How Long with this Employer	try
Number of Exemptions claimed on W4	try
Spouse Pay Period	Weekly
Amount	546
<b>Employer</b>	
Employer Name	tret
Occupation	tre
Employer Address	tert
How Long with this Employer	reter
Number of Exemptions claimed on W4	ret
Pay Period	Weekly

Amount	435345
Cash on Hand Amount	656.00
How Many Bank Accounts Do You Have	1
<b>Bank 1</b>	
	<a href="https://client.clearstarttax.com/public/upload/fq/9999571707132349.jpg">https://client.clearstarttax.com/public/upload/fq/9999571707132349.jpg</a>
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
<b>Spouse Asset Information</b>	
Spouse Cash on Hand Amount	55.00
How Many Bank Accounts Spouse Have	1
<b>Spouse Bank 1</b>	
	<a href="https://client.clearstarttax.com/public/upload/fq/9501891707132349.jpg">https://client.clearstarttax.com/public/upload/fq/9501891707132349.jpg</a>
Interest/Dividends	5.00
Net Self-Employed/Business Income	555.00
Net Rental Income	0.0055
Distribution	5.00
Social Security Income	5.005
Alimony Income	5.00
Retirement Income/ Pension	55.00
Other Income	5.00
Spouse Wages	55.00
Spouse Social Security Income	5.00
Total House Hold Income	695.01
Food, Clothing & Misc	56.00
Rent/Mortgage	546.00
Utilities	456.00

Vehicles Ownership Costs	6.00
Vehicles Operating Costs	4.00
Public Transportation	565.00
Health Insurance	656.00
Out of Pocket Health Costs	5656.00
Court Ordered Payments	6.00
Child Care	6456.00
Life Insurance	456.00
Taxes (Income & FICA)	456.00
Other Secure Debts	456.00
Other Secure Debts	456.00
Total Household Expense	16231.00
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	yrtyrty
Date	2024-02-21
Signature	Christian TESTTEST Ha TESTTESTTEST
Last Update	2024-02-05 11:25:49
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