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	<u>5435435</u>
2nd Contact Phone Number	<u>345435345</u>
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
Spouse Information	
First Name	tet
Last Name	wtw

SSNIF 564568464 Date Of Birth 2024-02-13 Client Employment Status Wage Earner Spouse Employment Information Spouse Employment Status Self-Employed Self-Employed Business Name t Employee ID # (If any) ½rity # of Employees (if any) 5 Average Monthly Payroll \$5 Type of Business (Pantnership, LLC, Corporation Other) ½ty Frequency of Tax Deposits hgth Business Website (if any) gf Spouse Employer Employer Name ty Occupation try Employer Address try Number of Exemptions claimed on W4 try Spouse Pay Period Weekly Amount 546 Employer Employer Name Employer Name tret Employer Name tret Employer Name tret Employer Name tret Employer Address tret	Driver's License	wetwe
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Pay Period Weekly	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
Bank 1 Do You Have Any Investments? (Ex: stocks, bonds, mutual funds, IRA, 401 and all other investments/retirement accounts)	https://client.clearstarttax.com/public/upload/fq/999957170713234 9.jpg 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. Spouse Asset Information	No
Spouse Cash on Hand Amount	55.00
How Many Bank Accounts Spouse Have	1
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Spouse Bank 1	https://client.clearstarttax.com/public/upload/fq/950189170713234 9.jpg
Interest/Dividends	
	9.jpg
Interest/Dividends	9.jpg 5.00
Interest/Dividends Net Self-Employed/Business Income	9.jpg 5.00 555.00
Interest/Dividends Net Self-Employed/Business Income Net Rental Income	9.jpg 5.00 555.00 0.0055
Interest/Dividends Net Self-Employed/Business Income Net Rental Income Distribution	9.jpg 5.00 555.00 0.0055 5.00
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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 TEST TEST HA TEST TEST TEST
Last Update	2024-02-05 11:25:49
Start Time	2024-02-05 11:25:49
Finish Time	2024-02-05 11:25:49
IP	116.73.63.112