

Financial Questionnaire

| | |
|--|---------------------------------------|
| Reference # | 65c0b8f83b486 |
| Status | Completed |
| Login Username | Christian TEST TEST Ha TEST TEST TEST |
| Login Email | management@clearstarttax.com |
| Last Name | test |
| First Name | tet |
| Marital Status | Married |
| Date Of Birth | 2024-02-06 |
| SSN# | 5345 |
| Married Filing Status | Married Filing Jointly |
| Street Address | 5435 |
| Address line 2 | test |
| City | test |
| State | est |
| Zip Code | 5345 |
| Rent Or Own (eg. share rent, live with relative, etc.) | tet |
| County Of Residence | test |
| Primary Phone Number | 543534 |
| 2nd Contact Phone Number | 4445435345 |
| Driver License # | setest |
| 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 | trtt |
| Last Name | rt |

| | |
|--|---|
| Driver's License | rtr |
| SSN# | 543544444 |
| Date Of Birth | 2024-02-07 |
| Client Employment Status | Wage Earner |
| Spouse Employment Information | |
| Spouse Employment Status | Self-Employed |
| Cash on Hand Amount | 4.00 |
| How Many Bank Accounts Do You Have | 1 |
| Bank 1 | |
| | https://client.clearstarttax.com/public/upload/fq/6366651707129080.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 | 5.00 |
| How Many Bank Accounts Spouse Have | 1 |
| Spouse Bank 1 | |
| | https://client.clearstarttax.com/public/upload/fq/9720791707129080.jpg |
| Interest/Dividends | 5.00 |
| Net Self-Employed/Business Income | 55.00 |
| Net Rental Income | 5.00 |
| Distribution | 5545.00 |
| Social Security Income | 5.00 |
| Alimony Income | 545.00 |
| Retirement Income/ Pension | 5.00 |
| Other Income | 5.005 |
| Spouse Wages | 5.00 |

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|---|------------------------------------|
| Spouse Social Security Income | 5.00 |
| Total House Hold Income | 6180.01 |
| Food, Clothing & Misc | 5.00 |
| Rent/Mortgage | 55.00 |
| Utilities | 5.00 |
| Vehicles Ownership Costs | 5.00 |
| Vehicles Operating Costs | 5.00 |
| Public Transportation | 5.00 |
| Health Insurance | 5.00 |
| Out of Pocket Health Costs | 5.00 |
| Court Ordered Payments | 5.00 |
| Child Care | 5.00 |
| Life Insurance | 5.00 |
| Taxes (Income & FICA) | 5.00 |
| Other Secure Debts | 5.00 |
| Other Secure Debts | 5.00 |
| Total Household Expense | 120.00 |
| 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 | test tes test etes |
| Date | 2024-03-09 |
| Signature | Christian TESTTEST Ha TESTTESTTEST |
| Last Update | 2024-02-05 10:31:20 |
| Start Time | 2024-02-05 10:31:20 |
| Finish Time | 2024-02-05 10:31:20 |
| IP | 116.73.63.112 |

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