

Financial Questionnaire

Reference #	653f4ec490208
Status	Completed
Login Username	Christian Ha
Login Email	management@clearstarttax.com
Last Name	test
First Name	test
Marital Status	Single
Date Of Birth	2023-10-31
SSN#	test
Street Address	test
Address line 2	test
City	test
State	est
Zip Code	et
Rent Or Own (eg. share rent, live with relative, etc.)	test
County Of Residence	estest
Primary Phone Number	543543
2nd Contact Phone Number	5435435
Driver License #	test
Do you have any dependents; EXCLUDING yourself and your spouse? (only include dependents that you claim on your tax returns)	have any dependents no
Client Employment Status	Wage Earner
Cash on Hand Amount	5345
How Many Bank Accounts Do You Have	1
Bank 1	http://127.0.0.1:8000/public/upload/fq/2534401698645687.png
Do You Have Any Investments? (Ex: stocks, bonds, mutual funds, IRA, 401 and all other investments/retirement accounts)	Yes

How many type of investments do you have?	2
Investment 1	
Type Of Investment	gfg
Company Name	gdfg
Current Value	dfgfd
Balance	gr
Payment	gfg
Investment 2	
Type Of Investment	gd
Company Name	tret
Current Value	erter
Balance	tertt
Payment	ter
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
Interest/Dividends	3
Net Self-Employed/Business Income	3
Net Rental Income	3
Distribution	33
Social Security Income	3
Alimony Income	3
Retirement Income/ Pension	3
Other Income	3
Total House Hold Income	3
Food, Clothing & Misc	3

Rent/Mortgage	3
Utilities	3
Vehicles Ownership Costs	3
Vehicles Operating Costs	3
Public Transportation	3
Health Insurance	3
Out of Pocket Health Costs	5
Court Ordered Payments	5
Child Care	5
Life Insurance	5
Taxes (Income & FICA)	5
Other Secure Debts	5
Other Secure Debts	5
Total Household Expense	55
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	treter
Date	2023-10-27
Signature	<i>Christian Ha</i>
Last Update	2023-10-30 06:35:48
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