

Financial Questionnaire

Reference #	65b788598ddb6
Status	Completed
Login Username	Christian TEST TEST Ha TEST TEST TEST
Login Email	management@clearstarttax.com
Last Name	test
First Name	test
Marital Status	Single
Date Of Birth	2024-01-30
SSN#	tets
Street Address	teste
City	test
State	sete
Zip Code	ste
Rent Or Own (eg. share rent, live with relative, etc.)	setestset
County Of Residence	stet
Primary Phone Number	tset
2nd Contact Phone Number	setset
Driver License #	et
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	5435
How Many Bank Accounts Do You Have	1
Bank 1	https://client.clearstarttax.com/public/upload/fq/5372271706526809.png
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
Interest/Dividends	5
Net Self-Employed/Business Income	5
Net Rental Income	5
Distribution	5
Social Security Income	5
Alimony Income	5435
Retirement Income/ Pension	5
Other Income	5
Total House Hold Income	5465
Food, Clothing & Misc	65
Rent/Mortgage	654
Utilities	6546
Vehicles Ownership Costs	654
Vehicles Operating Costs	64
Public Transportation	64
Health Insurance	64
Out of Pocket Health Costs	654
Court Ordered Payments	654
Child Care	6
Life Insurance	645
Taxes (Income & FICA)	6
Other Secure Debts	6
Other Secure Debts	546
Total Household Expense	6546

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
Date	2024-01-31
Signature	Christian TESTTESTHa TESTTESTTEST
Last Update	2024-01-29 11:13:29
Start Time	2024-01-29 11:13:29
Finish Time	2024-01-29 11:13:29
IP	49.43.3.129
Browse	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:122.0) Gecko/20100101 Firefox/122.0