

# Financial Questionnaire

Reference #	65c0bd35a4143
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	2024-02-13
SSN#	534534543
Married Filing Status	Married Filing Jointly
Street Address	test
Address line 2	test
City	test
State	esttset
Zip Code	54354
Rent Or Own (eg. share rent, live with relative, etc.)	tret
County Of Residence	ttertertre
Primary Phone Number	<a href="#">453454354</a>
2nd Contact Phone Number	<a href="#">3543543543</a>
Driver License #	retreter
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	test
Last Name	ete

Driver's License	etet
Date Of Birth	2024-02-23
Client Employment Status	Wage Earner
<b>Spouse Employment Information</b>	
Spouse Employment Status	Self-Employed
<b>Self-Employed</b>	
Business Name	dfg
Employee ID # (If any)	gfgfg
# of Employees (if any)	3
Average Monthly Payroll	3
Type of Business (Partnership, LLC, Corporation Other)	fgf
Frequency of Tax Deposits	dg
Business Website (if any)	fdgdfg
<b>Spouse Employer</b>	
Employer Name	tet
Occupation	wet
Employer Address	wet
How Long with this Employer	wetwet
Number of Exemptions claimed on W4	wt
Spouse Pay Period	Weekly
Amount	54354
<b>Employer</b>	
Employer Name	tet
Occupation	wtwe
Employer Address	twet
How Long with this Employer	ettwet
Number of Exemptions claimed on W4	ewtwet
Pay Period	Monthly
Amount	534543

Cash on Hand Amount	4535.00
How Many Bank Accounts Do You Have	1
<b>Bank 1</b>	
	<a href="https://client.clearstarttax.com/public/upload/fq/145451707130165.jpg">https://client.clearstarttax.com/public/upload/fq/145451707130165.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	45.00
How Many Bank Accounts Spouse Have	1
<b>Spouse Bank 1</b>	
	<a href="https://client.clearstarttax.com/public/upload/fq/4390401707130165.jpg">https://client.clearstarttax.com/public/upload/fq/4390401707130165.jpg</a>
Interest/Dividends	3.00
Net Self-Employed/Business Income	34.00
Net Rental Income	43.00
Distribution	43.00
Social Security Income	43.00
Alimony Income	434.00
Retirement Income/ Pension	34.00
Other Income	32.00
Spouse Wages	4.00
Spouse Social Security Income	33.00
Total House Hold Income	703.00
Food, Clothing & Misc	4.00
Rent/Mortgage	4.00
Utilities	4.00
Vehicles Ownership Costs	45434.00

Vehicles Operating Costs	4.00
Public Transportation	4545.00
Health Insurance	43.0054
Out of Pocket Health Costs	533.00
Court Ordered Payments	5345.00
Child Care	53.00
Life Insurance	345.00
Taxes (Income & FICA)	5.00
Other Secure Debts	543.00
Other Secure Debts	543.00
Total Household Expense	57405.01
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	tert
Date	2024-02-29
Signature	Christian TESTTESTHa TESTTESTTEST
Last Update	2024-02-05 10:49:25
Start Time	2024-02-05 10:49:25
Finish Time	2024-02-05 10:49:25
IP	116.73.63.112
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