

Financial Questionnaire

Reference #	65e4e924d4a9d
Status	Completed
Login Username	Tracee Gibbons
Login Email	gibbint@gmail.com
Last Name	Gibbons
First Name	Tracee
Marital Status	Single
Date Of Birth	1964-09-14
SSN#	565173970
Street Address	3716 Bigler Way
Address line 2	3716 Bigler Way
City	Sacramento
State	California
Zip Code	95817
Rent Or Own (eg. share rent, live with relative, etc.)	rent
County Of Residence	UnitedStates
Primary Phone Number	8312398888
Driver License #	u0123457
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	Unemployed
Cash on Hand Amount	9890.00
How Many Bank Accounts Do You Have	1
Bank 1	https://client.clearstarttax.com/public/
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?	Yes
How many Credit Cards Do You Have?	2
Credit Card 1	https://client.clearstarttax.com/public/upload/fq/9350241708037694.pdf
Credit Card 2	https://client.clearstarttax.com/public/upload/fq/5130651708037694.pdf
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?	Yes
How Many Motor Vehicles Do You Own?	1
Vehicle 1	
Make and Model	Mercedes c300
Year	Mercedes c300
Mileage	Mercedes c300
Lease or Own	Mercedes c300
Date Of Purchased/Lease	Mercedes c300
Date Of Final Payment	Mercedes c300
Current Value	Mercedes c300
Current Loan Value	Mercedes c300
Monthly Payment	Mercedes c300
Name of Lender/Lessor	Mercedes c300
Is Vehicle 1 Financed or Leased?	Mercedes c300
Vehicle 1 (Upload most recent car note statement)	https://client.clearstarttax.com/public/
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	0.00
Net Self-Employed/Business Income	0.00
Net Rental Income	0.00
Distribution	0.00
Social Security Income	0.00
Alimony Income	0.00
Retirement Income/ Pension	0.00

Other Income	0.00
Total House Hold Income	0.00
Food, Clothing & Misc	550.00
Rent/Mortgage	1900.00
Utilities	200.00
Vehicles Ownership Costs	0.00
Vehicles Operating Costs	200.00
Public Transportation	0.00
Health Insurance	118.23
Out of Pocket Health Costs	50.00
Court Ordered Payments	0.00
Child Care	0.00
Life Insurance	0.00
Taxes (Income & FICA)	0.000
Other Secure Debts	0.00
Other Secure Debts	-2.00
Total Household Expense	3016.23
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	Tracee Lee Gibbons
Date	2024-02-15
Signature	<i>Tracee Gibbons</i>
Last Update	2024-03-03 21:18:28
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