

Financial Questionnaire

Reference #	65c0b856a7ec1
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	2024-02-07
SSN#	5345345
Street Address	test
Address line 2	test
City	tset
State	stet
Zip Code	5345
Rent Or Own (eg. share rent, live with relative, etc.)	dfgdf
County Of Residence	tdgdfg
Primary Phone Number	5345
2nd Contact Phone Number	3453453
Driver License #	gdfg
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	543.00
How Many Bank Accounts Do You Have	1
Bank 1	https://client.clearstarttax.com/public/upload/fq/7208861707128918.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
Interest/Dividends	5.00
Net Self-Employed/Business Income	54.00
Net Rental Income	6.00
Distribution	4.00
Social Security Income	6.00
Alimony Income	0.040
Retirement Income/ Pension	6.00
Other Income	4.00
Total House Hold Income	85.04
Food, Clothing & Misc	5.00
Rent/Mortgage	5.00
Utilities	55.00
Vehicles Ownership Costs	5.00
Vehicles Operating Costs	5.00
Public Transportation	0.005
Health Insurance	534.00
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
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Total Household Expense	644.00
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	5
Date	2024-02-20
Signature	Christian TESTTEST Ha TESTTESTTEST
Last Update	2024-02-05 10:28:38
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