

Financial Questionnaire

Reference #	16777587
Status	Complete
Login Username	info@clearstarttax.com
Login Email	info@clearstarttax.com
Last Name	Martin
First Name	Alfa
Marital Status	Married
Date Of Birth	1975-06-07
SSN#	428275558
Married Filing Status	Married Filing Separately
Street Address	1032 Morgans Lane
City	Summit
State	Mississippi
Zip Code	39666
Rent Or Own (eg. share rent, live with relative, etc.)	Moved in with wife
County Of Residence	Pik
Primary Phone Number	888-235-0004
Driver License #	801643215
Do you have any dependents; EXCLUDING yourself and your spouse? (only include dependents that you claim on your tax returns)	No
Client Employment Status	Wage Earner/ Employee
Cash on Hand Amount	1700
How Many Bank Accounts Do You Have	1
Bank 1 (Upload most recent 3 months of bank statements)	IMG_018127874.png IMG_018127874.png IMG_018127874.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?	Yes
How many Credit Cards Do You Have?	1
Credit Card 1 (Upload Most Recent 3 Months Credit Card Statements)	IMG_018127874.png IMG_018127874.png IMG_018127874.png
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)	Yes
How Many Properties Do You Own?	1
Property 1	
Property Address	78 hammond rd Jayess, MS
Country	Walthall
Mortgage Lender	N/A
Purchase Date	2004
Fair Market Value	10000
Loan Balance	0
Monthly Payment	0
Date of Final Payment	N/A
Monthly Property Tax	143.00
How is Title held (Joint, Tenancy, etc.)	Own
Property 1 (Upload most recent mortgagestatement)	IMG_018127874.png
Do You Own A Motor Vehicle?	Yes
How Many Motor Vehicles Do You Own?	1
Vehicle 1	
Make and Model	Ford F350
Year	2015
Mileage	159000
Lease or Own	Own
Date Of Purchased/Lease	Oct 2019
Date Of Final Payment	October 2019
Current Value	25000
Current Loan Value	20000

Monthly Payment	836.00
Name of Lender/Lessor	One Main Fin
Is Vehicle 1 Financed or Leased?	Yes
Vehicle 1 (Upload most recent car note statement)	IMG_018127874.png
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
Wages	72000
Pay Stubs (Upload Recent 3 months of paystubs)	IMG_018127874.png IMG_018127874.png IMG_018127874.png
Interest/Dividends	0
Net Self-Employed/Business Income	0
Net Rental Income	0
Distribution	0
Social Security Income	0
Alimony Income	0
Retirement Income/ Pension	0
Other Income	0
Total Household Income	72000.00
Total House Hold Income	142000
Food, Clothing & Misc	500.00
Rent/Mortgage	0
Utilities	500.00
Vehicles Ownership Costs	1900.00
Vehicles Operating Costs	240.00
Public Transportation	0
Health Insurance	172.00
Out of Pocket Health Costs	2500.00
Court Ordered Payments	0
Child Care	0
Life Insurance	0
Taxes (Income & FICA)	1200.00

Other Secure Debts	0
Other Secure Debts	0
Total Household Expense	5812.00
Total Household Expense	500.00
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	Lillian Martin
Date	2023-09-14
Signature	
Last Update	2023-09-14 20:52:51
Start Time	2023-09-14 19:32:12
Finish Time	2023-09-14 20:52:50
IP	75.105.229.198
Browse	Safar
Device	Mobile
Referrer	https://fs8.formsite.com/res/formLoginReturn:jsessionid=327329FDC802F068C4FEF87952B7E5D2:jsessionid=327329FDC802F068C4FEF87952B7E5D2: