

Financial Questionnaire

Reference #	65c0af200430d
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	2024-02-06
SSN#	453534
Street Address	test
Address line 2	rtretr
City	trt
State	ertertt
Zip Code	5345
Rent Or Own (eg. share rent, live with relative, etc.)	ertert
County Of Residence	trtret
Primary Phone Number	5435345
2nd Contact Phone Number	345435345
Driver License #	erter
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	Self-Employed
Cash on Hand Amount	54.00
How Many Bank Accounts Do You Have	1
Bank 1	https://client.clearstarttax.com/public/upload/fq/8711501707126560.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	4.00
Net Self-Employed/Business Income	4.00
Net Rental Income	45.00
Distribution	5.00
Social Security Income	5.00
Alimony Income	4.00
Retirement Income/ Pension	54.00
Other Income	5.00
Total House Hold Income	126.00
Food, Clothing & Misc	543.00
Rent/Mortgage	5345.00
Utilities	345.00
Vehicles Ownership Costs	345.00
Vehicles Operating Costs	5.00
Public Transportation	34534.00
Health Insurance	543.00
Out of Pocket Health Costs	5345.00
Court Ordered Payments	345.00
Child Care	345.00
Life Insurance	5.00
Taxes (Income & FICA)	345.00
Other Secure Debts	5.00
Other Secure Debts	45345.00

Total Household Expense	93395.00
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	teest
Date	2024-02-22
Signature	Christian TESTTEST Ha TESTTESTTEST
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