

Financial Questionnaire

Reference #	65b7ac1bd844e
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	2024-01-30
SSN#	54353
Street Address	test
Address line 2	test
City	test
State	test
Zip Code	54534
Rent Or Own (eg. share rent, live with relative, etc.)	test
County Of Residence	test
Primary Phone Number	543543534
2nd Contact Phone Number	5345435
Driver License #	test
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	200
How Many Bank Accounts Do You Have	1
Bank 1	https://client.clearstarttax.com/public/upload/fq/2284281706535963.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	80
Net Self-Employed/Business Income	80
Net Rental Income	80
Distribution	80
Social Security Income	7
Alimony Income	80
Retirement Income/ Pension	7
Other Income	7
Total House Hold Income	421
Food, Clothing & Misc	5
Rent/Mortgage	5
Utilities	5
Vehicles Ownership Costs	5
Vehicles Operating Costs	5
Public Transportation	5
Health Insurance	55
Out of Pocket Health Costs	5
Court Ordered Payments	5
Child Care	5
Life Insurance	5
Taxes (Income & FICA)	5
Other Secure Debts	5
Other Secure Debts	5

Total Household Expense	120
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	tes test
Date	2024-01-30
Signature	Christian TESTTEST Ha TESTTESTTEST
Last Update	2024-01-29 13:46:03
Start Time	2024-01-29 13:46:03
Finish Time	2024-01-29 13:46:03
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