

Financial Questionnaire

Reference #	65c0d38ad6860
Status	Completed
Login Username	Christian TEST TEST Ha TEST TEST TEST
Login Email	management@clearstarttax.com
Last Name	test
First Name	test
Marital Status	Married
Date Of Birth	2024-02-06
SSN#	78768
Married Filing Status	Married Filing Jointly
Street Address	test
Address line 2	test
City	test
State	estset
Zip Code	4553
Rent Or Own (eg. share rent, live with relative, etc.)	tett
County Of Residence	rtrete
Primary Phone Number	435435465
2nd Contact Phone Number	5345345
Driver License #	etertert
Do you have any dependents; EXCLUDING yourself and your spouse? (only include dependents that you claim on your tax returns)	have any dependents no
Married Filing Status	Married Filing Jointly
Spouse Information	
First Name	tewt
Last Name	wt

Driver's License	wet
Date Of Birth	2024-03-01
Client Employment Status	Self-Employed
Spouse Employment Information	
Spouse Employment Status	Self-Employed
Self-Employed	
Business Name	tet
Employee ID # (If any)	te
# of Employees (if any)	555
Average Monthly Payroll	55
Type of Business (Partnership, LLC, Corporation Other)	gh
Frequency of Tax Deposits	hghgh
Business Website (if any)	gh
Spouse Employer	
Employer Name	tret
Occupation	tet
Employer Address	retret
How Long with this Employer	ret
Number of Exemptions claimed on W4	trt
Spouse Pay Period	Bi-Weekly
Amount	543543
Employer	
Employer Name	tew
Occupation	twe
Employer Address	tew
How Long with this Employer	tet
Number of Exemptions claimed on W4	tew
Pay Period	Bi-Weekly
Amount	435435

Cash on Hand Amount	5435.00
How Many Bank Accounts Do You Have	1
Bank 1	
	https://client.clearstarttax.com/public/upload/fq/3690631707133085.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
Spouse Asset Information	
Spouse Cash on Hand Amount	5435.00
How Many Bank Accounts Spouse Have	1
Spouse Bank 1	
	https://client.clearstarttax.com/public/
Interest/Dividends	654654.00
Net Self-Employed/Business Income	0.00
Net Rental Income	56.00
Distribution	6.00
Social Security Income	54654.00
Alimony Income	654.00
Retirement Income/ Pension	5645.00
Other Income	56.00
Spouse Wages	5465.00
Spouse Social Security Income	45645.00
Total House Hold Income	766835.00
Food, Clothing & Misc	4.00
Rent/Mortgage	4.00
Utilities	0.00
Vehicles Ownership Costs	0.00

Vehicles Operating Costs	0.00
Public Transportation	0.00
Health Insurance	0.00
Out of Pocket Health Costs	0.00
Court Ordered Payments	4.00
Child Care	4.00
Life Insurance	4.00
Taxes (Income & FICA)	44.00
Other Secure Debts	4.00
Other Secure Debts	4.00
Total Household Expense	72.00
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	rtter
Date	2024-02-29
Signature	Christian TESTTESTHa TESTTESTTEST
Last Update	2024-02-05 12:24:42
Start Time	2024-02-05 12:24:42
Finish Time	2024-02-05 12:24:42
IP	116.73.63.112
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