

Financial Questionnaire

Reference #	65dbb4a879c31
Status	Completed
Login Username	Luis Berrios
Login Email	arielberrios@rocketmail.com
Last Name	BERRIOS
First Name	LUIS
Marital Status	Married
Date Of Birth	1961-05-16
SSN#	582390258
Married Filing Status	Married Filing Jointly
Street Address	23230 Skila Dr
City	Elmendorf
State	TX
Zip Code	78112
Rent Or Own (eg. share rent, live with relative, etc.)	Own
County Of Residence	Bexar
Primary Phone Number	2108035963
Driver License #	44971093
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	Keila
Last Name	Sosa
Driver's License	44971147
SSN#	581473718

Date Of Birth	1960-11-02
Client Employment Status	Retired
Spouse Employment Information	
Spouse Employment Status	Unemployed
Cash on Hand Amount	4300.00
How Many Bank Accounts Do You Have	1
Bank 1	https://client.clearstarttax.com/public/
Do You Have Any Investments? (Ex: stocks, bonds, mutual funds, IRA, 401 and all other investments/retirement accounts)	Yes
How many type of investments do you have?	2
Investment 1	
Type Of Investment	
Company Name	
Current Value	
Balance	
Payment	
Investment 2	
Type Of Investment	
Company Name	
Current Value	
Balance	
Payment	
Can you take a loan against your 401k Account?	No
Do You Have Any Credit Cards?	Yes
How many Credit Cards Do You Have?	5
Credit Card 1	https://client.clearstarttax.com/public/
Credit Card 2	https://client.clearstarttax.com/public/
Credit Card 3	https://client.clearstarttax.com/public/
Credit Card 4	https://client.clearstarttax.com/public/
Credit Card 5	https://client.clearstarttax.com/public/

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?	2

Property 1

Property Address

Country

Mortgage Lender

Purchase Date

Fair Market Value

Loan Balance

Monthly Payment

Date of Final Payment

Monthly Property Tax

How is Title held (Joint, Tenancy, etc.)

Property 1 (Upload most recent mortgagestatement) <https://client.clearstarttax.com/public/>

Property 2

Property Address

Country

Mortgage Lender

Purchase Date

Fair Market Value

Loan Balance

Monthly Payment

Date of Final Payment

Monthly Property Tax

How is Title held (Joint, Tenancy, etc.)

Property 1 (Upload most recent mortgagestatement) <https://client.clearstarttax.com/public/>

Do You Own A Motor Vehicle? Yes

How Many Motor Vehicles Do You Own? 2

Vehicle 1

Make and Model

Year

Mileage

Lease or Own

Date Of Purchased/Lease

Date Of Final Payment

Current Value

Current Loan Value

Monthly Payment

Name of Lender/Lessor

Is Vehicle 1 Financed or Leased?

Vehicle 1 (Upload most recent car note statement)

<https://client.clearstarttax.com/public/>**Vehicle 2**

Make and Model

Year

Mileage

Lease or Own

Date Of Purchased/Lease

Date Of Final Payment

Current Value

Current Loan Value

Monthly Payment

Name of Lender/Lessor

Is Vehicle 1 Financed or Leased?

Vehicle 2 (Upload most recent car note statement)

<https://client.clearstarttax.com/public/>

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

0.00

Net Self-Employed/Business Income

0.00

Net Rental Income	0.00
Distribution	0.00
Social Security Income	2248.00
Alimony Income	0.00
Retirement Income/ Pension	0.00
Other Income	0.00
Total House Hold Income	2248.00
Food, Clothing & Misc	450.00
Rent/Mortgage	0.00
Utilities	380.00
Vehicles Ownership Costs	550.00
Vehicles Operating Costs	400.00
Public Transportation	0.00
Health Insurance	375.00
Out of Pocket Health Costs	250.00
Court Ordered Payments	0.00
Child Care	0.00
Life Insurance	30.00
Taxes (Income & FICA)	0.00
Other Secure Debts	0.00
Other Secure Debts	0.00
Total Household Expense	2435.00
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	LUIS BERRIOS
Date	2024-02-25

Signature	<i>Luis Berrios</i>
Last Update	2024-02-25 21:44:08
Start Time	2024-02-25 21:44:08
Finish Time	2024-02-25 21:44:08
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Browse	Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/121.0.0.0 Safari/537.36