

Beginning of Year Review

I am looking forward to meeting with you for our upcoming Beginning of Year Review! Here is a checklist of action items that I would like to request that you complete before we meet. If it's not possible or life gets in the way, please don't let it cause you any stress. Do the best you can.

- Log into eMoney and note the accuracy of your personal financial situation. Please fix any banking/financial links that may need re-authentication and add any new bank accounts that may have been opened. The eMoney login is: <https://wealth.emaplan.com/ema/xypn/kopkafinancial>
- Review the Objectives in your Money Brief for reference during our meeting.
- Complete a new Investment Questionnaire (sent from Riskalyze via email for couples, each person will complete their own)

If you have any questions or need any help with anything, please don't hesitate to reach out. I look forward to seeing you soon!

Thank you,
Megan Kopka