

## End of Year Review

I am looking forward to meeting with you for our upcoming End 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/xypr/kopkafinancial>
- Take a look at your will and basic estate documents and review the wishes and preferences outlined. Upload a copy to the eMoney Vault if they are not there already.
- Determine if it has been more than two years since you shopped for rates on auto and home insurance. If so, upload your declarations pages to the eMoney Vault.

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