

Mid-year Review

I am looking forward to meeting with you for our upcoming Mid-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>
- Review any open action items in eMoney and check off any that are done.
- Upload your prior year tax return to the eMoney Vault in your "Shared Documents" folder (if you have not done so already).

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