

James E. Moede, CPA
Financial Report Card

Area	Description	Need Help
Legal	Will	
Legal	Living Trust	
Legal	Durable Power of Attorney	
Legal	Gifts & Charity Planning	
Legal	Health Care Directive	
Legal	Business Start-up	
Investing	Education - 529 Plan	
Investing	Retirement	
Investing	Diversification	
Investing	Beneficiary Designations	
Investing	Plan Rollovers	
Investing	Non-retirement Investing	
Insurance	Business Coverage	
Insurance	Umbrella Coverage	
Insurance	Homeowners/Auto Insurance	
Insurance	Life Insurance	
Insurance	Health Insurance	
Insurance	Disability Insurance	
Insurance	Long-Term Care Insurance	
Information Technology	Computer/Network Consulting	
Information Technology	Website	
Information Technology	Security	
Information Technology	Mobile Devices	
Information Technology	Home Wi-Fi Security	

Use this free Financial Report Card to review your individual situation. If you would like me to help you find a qualified professional to help you with one or more of the above services, please email me (jmoede@jamesmoede.com).

I will not share any of your personal and tax information with another professional, unless you provide me with written permission. I will provide you with a qualified professional's contact information so you may initiate the contact.