**Preparation of Year-End or Quarterly SDIRA Statements**

**Statements Would Combine Both**

**Cash Statement and Stock Ownership**

**Preparation Example:**

* Prepared on official bank stationery
* Watermarked the name of bank on stationery (offered elevated official look)
* Addressed both the Certificate CD Component and Shareholder Ownership
* Preparation of Statement (see example)
  + Provided Account number(s)
  + Provided a Summary Accounting
* Identified Beneficiaries
* Contact Information