

Legal Documents Folder

Original Legal Documents

- i. Partnerships
- ii. Private Agreements – Credits and Debts
- iii. Employment contracts
- iv. Retirement/pension contracts
- v. Annuities

Insurance Policies

Life insurance Policies

Long Term Care Policies

Cash & Investment Folder

Bank Subfolder

Recent Bank Statements

Investment Subfolder

Recent Broker statements

Credit Card Subfolder

Monthly Bills this year