

INFORMATION AND HELP DOCUMENT – 001

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WHY USE A SECURE PORTAL??

- *Secured way of exchanging electronic documents of a confidential nature.*
- *Accessible wherever a person has access to the Internet.*

WHAT WOULD I STORE ON A SECURE PORTAL?

- *Tax Returns and Supporting documentation*
- *Insurance Policies (and supporting documents such as claims and final resolutions.)*
- *Bank Statements*
- *Accounting Software and Associated Transfer/Backup Files*
- *Financial Statements – Business and Personal*
- *Deeds to Property*
- *Titles to Assets*
- *Wills, Living Wills (and related documents)*
- *Powers of Attorney Documents*
- *Business Formation Documents – State and Federal*
- *Digital Versions of Passport, Social Security Card, etc..*

The ideas are endless. . .