

Oikos

Emergency binder

Kallis (example) · Sample · Prepared 12/10/2026

Key contacts, call these first

CONTACT	ROLE	PHONE
Example Law Partners	Family lawyer	+357 00 000001
Example Accounting Ltd	Accountant	+357 00 000002
Example Bank Cyprus	Relationship manager	+357 00 000003
Example Insurance Ltd	Insurer	+357 00 000004

Who has access

PERSON	ACCESS
Marios Kallis	Owner, full access
Elena Kallis	Family member, read access
Nikos Kallis	Sub-principal, write access to his own entities

Properties

ASSET	OWNERS	VALUE
Villa Thalassa, Limassol	Kallis Family Trust 100%	€1,850,000
Olive farm, Paphos	Kallis Family Trust 60%, Kallis Agri Ltd 40%	€1,150,000
Nicosia offices	Kallis Properties Ltd 100%	€1,300,000
Larnaca apartment	Elena Kallis 100%	€420,000
Plot, Polis Chrysochous	Marios Kallis 50%, Elena Kallis 50%	€310,000

Loans

LOAN	LENDER	BALANCE
Farm mortgage	Example Bank Cyprus	€410,000
Nicosia offices facility	Example Bank Cyprus	€620,000
Larnaca apartment loan	Example Coop Bank	€180,000

Insurance

POLICY	INSURER	RENEWS	SUM INSURED
Villa Thalassa home insurance (Villa Thalassa, Limassol)	Example Insurance Ltd	26/12/2026	€1,600,000

Documents on file

DOCUMENT	COVERS
Title deed	Villa Thalassa, Limassol
Loan agreement	Farm mortgage, Example Bank Cyprus
Lease	Nicosia offices, Example Legal Services Ltd

DOCUMENT	COVERS
Insurance schedule	Villa Thalassa home insurance
Valuation report	Olive farm, Paphos

A real binder contains sensitive information. Keep it somewhere safe and replace it when details change.

Exchange rates used: 1 GBP = 1.16 EUR; 1 USD = 0.92 EUR.

This is a sample made from a fictional family. No real person, company or property is shown.

This document is for information only. It is not financial, legal or tax advice.

SAMPLE