VAULT CHECKLIST

Protect Your Important Documents

With unlimited secure document storage, you can organize and protect your most important documents. Review the checklist below and start adding to your Vault today!

LEGAL DOCUMENTS Wills Deeds Revocable & Irrevocable Trusts Power of Attorney Codicils (Supplements made to a Will) Living Wills/Health Directives

BENEFITS	
	Contracts
	Buy/Sell Agreements
	Prenuptial Agreements
	Living Wills/Health Directives
	Codicils (Supplements made to a Will)

☐ Social Security Info

- lacktriangle Veteran's Administration Info
- ☐ Employment Benefits

INSURANCE POLICIES

☐ (Life, LTD, Disability, Medical, Car, Property)

BANK & INVESTMENT STATEMENTS

- $\hfill \square$ Pensions, IRAs, Annuities, etc.
- Investment Accounts
- $\hfill \square$ Stock Options/Certificates

LIABILITIES

- ☐ List of Credit Cards with Contact Information
- Mortgages
- Loans

TAXES

- Tax Returns
- □ W-2 Forms



IDENTIFICATION

- Birth Certificates
- Drivers Licenses
- Passports
- Social Security Cards

FAMILY

- Adoption Papers
- Medical Records
- Marriage License
- Pictures
- Audio Files
- Video Clips

PROPERTY

- ☐ Titles to Homes, Autos, Boats, etc.
- Warranties