# Vault Checklist

## **Protect Your Imporantant Documents**

Our unlimited secure document storage helps 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
- ☐ Prenuptial Agreements
- ☐ Buy/Sell Agreements
- □ Contracts

## Social Security and/or Veteran's Administration Info

#### **Insurance Policies**

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

#### **Medical Records**

#### **Bank & Investment Statements**

- ☐ Pensions, IRAs, Annuities etc.
- ☐ Investment Accounts
- ☐ 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

#### **Family**

- ☐ Adoption Papers
- ☐ Marriage License
- □ Pictures
- □ Audio Files
- □ Video Clips

### **Property**

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

### **Employment Benefits**