

## 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
- ☐ Prenuptial Agreements
- ☐ Buy/Sell Agreements
- ☐ Contracts

### BENEFITS

- ☐ Social Security Info
- ☐ Veteran's Administration Info
- ☐ Employment Benefits

### INSURANCE POLICIES

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

### BANK & INVESTMENT STATEMENTS

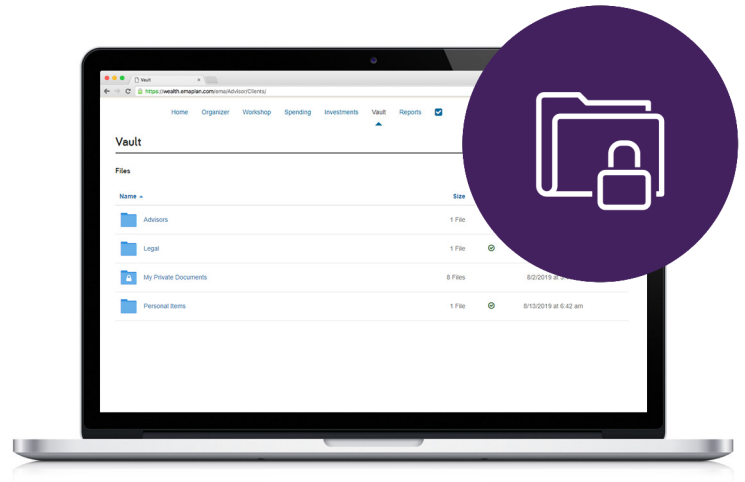
- ☐ Pensions, IRAs, Annuities, etc.
- ☐ Investment Accounts
- ☐ Stock Options/Certificates

### LIABILITIES

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

### TAXES

- ☐ Tax Returns
- ☐ W-2 Forms



### IDENTIFICATION

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

### FAMILY

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

### PROPERTY

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