

VAULT CHECKLIST

 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
- Beneficiary Forms

 Soc. Sec. and/or Veteran's Administration Info.
 Insurance Policies (Life, LTD, Disability, Medical, Car, Property)
 Medical Records
 Bank and Investment Statements

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

 Liabilities

- List of Credit Cards
- 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.

 Employment Benefits


*** Please Note:**
 Avoid uploading items to your vault that may contain personally identifiable information.

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