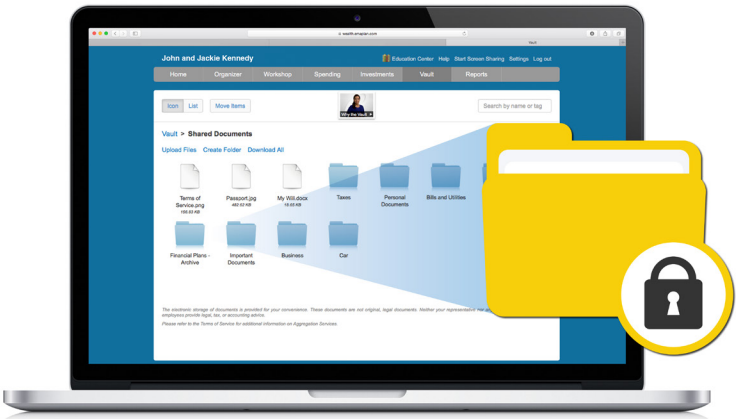
Vault Checklist

Protect Your Important 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