SECOND HALF STRATEGIES

Vault Storage Checklist

Personal Documents

Drivers Licenses
Location of Safe Deposit Boxes/Keys
Passports
Membership Info
Global Entry Documents
Awards Membership Info
Birth Certificate
Social Security Information
Veteran's Administration Information
Pension Documents

Legal Documents

Wills
Trusts
Codicils
Powers of Attorney
Health Care Powers of Attorney
Living Will
Prenuptial Agreements
Deeds
Buy/Sell Agreements
Marriage License
Adoption Papers
Titles to Homes, Auto, Boats, etc

Employment Information

Information on former
and current employers
Employment Benefits
401k Investment Options
HSA Investment Options

Income Tax Documents

Tax Returns
W-2 Forms/All Tax Forms
Pay Stubs

Insurance Policies

Life
Long Term Care
Disability
Medical
Car
Property

Statements

Credit Card
Checking Saving, Money Market
Loans
Mortgage
Brokerage
Mutual Fund
401K, IRA
Annuities
529 Plans
Stock Option Grants/Certificates

Household Items

Art Collection Photos
Warranties
Household Inventory List

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