

## Vault Storage Checklist

The following is a checklist of important files that can be stored in your Vault. Many of the files listed are examples of information that would need to be located and analyzed by family members in the event of an emergency or a premature death. These documents can be stored in your Vault and are easily accessible to you and your family.

### FINANCIAL

- Bank Statements
- Account Statements
- Retirement Account Statements
- Stock Certificates
- Buy/Sell Trade Confirmations
- Financial Reports
- Pension Plans
- Profit Sharing Plans
- Stock Option Grants/Certificates
- Income Tax Returns
- Pay Stubs
- Social Security Statements
- Loan Documents

### INSURANCE

- Life Insurance Policies
- Disability
- Homeowner's
- Auto
- Liability
- Annuities
- Group
- Health Insurance
- Long Term Care
- Illustrations

### PERSONAL

- Driver's License
- Passports
- Birth Certificates
- Marriage License
- Social Security Cards
- Pre-nuptial Agreements
- Divorce Decrees
- Vehicle Registration
- Adoption Papers
- Citizenship Papers
- Awards Membership Info

### ESTATE PLANNING

- Wills
- Living Wills
- Codicils
- Trust Agreements
- Crummey Power Letters
- Durable Power of Attorney
- Healthcare Power of Attorney
- Do Not Resuscitate Order

### BUSINESS

- Valuations
- Partnership Agreements
- Buyout Agreements
- Incorporation Documents
- Tax Returns
- Employee Census
- Employee Benefits

### REAL ESTATE

- Deeds & Titles
- Lease Agreements
- Mortgage Documents

### HOUSEHOLD ITEMS & PHOTOS

- Art Collection
- Jewelry
- Antiques
- Household Inventory List
- Warranties

### MISCELLANEOUS

- Membership Cards
- Credit Cards
- Title to Auto, Boats, etc.

### OTHER ITEMS

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