Vault Storage Checklist

The following is a checklist of important documents that you may want to store in your online Vault. Many of the documents listed are examples of information that would need to be located & analyzed by family members in the event of an emergency or a premature death. These documents can be scanned & stored in the Vault, easily accessible to you and your family anywhere there is internet access. If there are any documents that are not listed below that you would like included in your Vault just let us know. In order to keep your vault from becoming cluttered, documents will be removed from time to time as they are updated (i.e. Wills & Trusts) or if they are deemed to be no longer applicable.

Document Description	✓	Document Expiration
Legal Documents		As Updated
Wills		
Revocable & Irrevocable Trusts		
Power of Attorney		
Codicils		
Living Wills/Health Directives		
Deeds/Mortgages		
Titles to Homes, Autos, Boats, etc…		
Prenuptial Agreements		
Buy/Sell Agreements		
Marriage Certificates		
Divorce Decrees		
Birth Certificates		
Passports		
Drivers Licenses		
Insurance Policies		As Updated
Life		
Disability		
Long-Term Care		
Tax Returns		As Updated
Individual (Last Four Years)		
Business (Last Four Years)		
Estate		
Other Documents		As Updated
Audio Files (Messages or bequests to family)		
Location of Safe Deposit Boxes & Keys		