

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documents will be removed from time to time as they are updated (i.e. Wills & Trusts) or if they are deemed to be no longer applicable.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	

Securities and Advisory Services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC. Hall & Burns Wealth Management, LLC and LPL Financial are independent companies and are not affiliated. The decision to include or not include certain documents in the vault is your decision. Although the vault provides an "online safety deposit box", it is not meant to replace your own physical safety deposit box. Always consult your tax and/or legal advisor before deciding to discard any tax or legal documents.