

VAULT CHECKLIST



Personal Financial View®

When was the last time you backed up your most important legal and financial documents? Are they safely protected and accessible to you and your family?

The Vault is your online safety deposit box. We recommend that you store all your important legal, personal and financial documents, so that they are securely backed up and accessible to you from anywhere. Below is a list of typical documents.

Financial

- Bank Statements
- Retirement Account Statements
- Stock Certificates
- Buy-Sell Trade Confirmations
- Financial Reports
- Pension Plans
- Profit Sharing Plans
- Tax Returns
- Social Security Statements
- Loan Documents

Insurance

- Life Policies
- Disability
- Homeowners
- Auto
- Liability
- Annuities
- Group
- Health Insurance
- Long Term Care
- Illustrations

Personal

- Driver's License(s)
- Passports
- Birth Certificates
- Marriage License
- Prenup Agreements
- Divorce Decrees
- Vehicle Registration
- Social Security Statements
- Adoption Papers
- Citizenship Papers

Estate Planning

- Wills
- Living Wills
- Codicils
- Trust Agreements
- Crummey Letters
- Durable Power of Attorney
- Durable Power of Attorney for Healthcare

Business

- Valuations
- Partnership Agreements
- Business Agreements
- Buyout Agreements
- Tax Returns
- Employee Census
- Employee Benefits

Pictures

- Art Work
- Jewelry
- Antiques
- Real Estate
- Other Property

Real Estate

- Deeds and Titles
- Buy-Sell Agreements
- Lease Agreements

Miscellaneous

- Membership Cards
- Credit Cards
- Social Security Cards