

# Vault Checklist

Protect Your Important Documents



IADVISOR

Our unlimited secure document storage helps organize and protect your most important documents. Review the checklist below and start adding to your Vault today!

## Legal Documents

- Wills
- Deeds
- Revocable & Irrevocable Trusts
- Power of Attorney
- Codicils (Supplements made to a Will)
- Living Wills/Health Directives
- Prenuptial Agreements
- Buy/Sell Agreements
- Contracts

## Social Security and/or Veteran's Administration Info

### Insurance Policies

(Life, LTD, Disability, Medical, Car, Property)

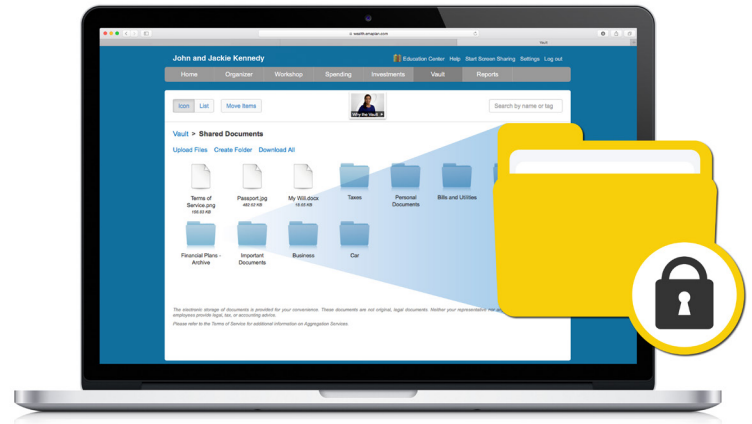
### Medical Records

### Bank & Investment Statements

- Pensions, IRAs, Annuities etc.
- Investment Accounts
- Stock Options/Certificates

### Liabilities

- List of Credit Cards with contact information
- Mortgages
- Loans



## Taxes

- Tax Returns
- W-2 Forms

## Identification

- Birth Certificates
- Drivers Licenses
- Passports

## Family

- Adoption Papers
- Marriage License
- Pictures
- Audio Files
- Video Clips

## Property

- Titles to Homes, Autos, Boats, etc.
- Warranties

## Employment Benefits