

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.

Personal Documents

Drivers Licenses
Location of Safe Deposit Boxes/Keys
Passports
Membership Info

Awards Membership Info
Birth Certificate
Social Security Info
Veteran's Administration Info

Media

VIDEO

Video Recording of your Will
Home Movies
Children's Events

PHOTOS

Family Vacations
Special Occasions

AUDIO

Audio Recording of your Will
Client Dictations
Seminars/Speeches
Recorded Journal

Legal Documents

Wills
Deeds
Trusts
Power of Attorney
Codicils
Prenuptial Agreements

Buy/Sell Agreements
Marriage License
Adoption Papers
Birth Certificate
Titles to Homes, Auto, Boats, etc

Employment Information

Information on former
and current employers
Employment Benefits

Income Tax Documents

Tax Returns
W-2 Forms/All Tax Forms
Pay Stubs

Vault Storage Checklist

Continued

Insurance Policies

Life
LTD
Disability
Medical
Car
Property

Bank Statements

Credit Card
Checking, Saving, Money Market
Loans
Mortgage
Investment

Investments

Brokerage
Mutual Fund
401K, IRA
Pensions, Annuities
529 Plans
Stock Option Grants/Certificates

Household Items and Photos

Art Collection Photo
Warranties
Household Inventory List