

Vault Checklist



Type of Document	✓	Expiration Date
Legal Documents		
Wills		
Deeds		
Revocable & Irrevocable Trusts		
Power of Attorney		
Codicils		
Living Wills/Health Directives		
Prenuptial Agreements		
Buy/Sell Agreements		
Soc. Sec. 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		
Credit Cards		
Mortgages		
Loans		
Tax Returns		
Information on current and former Employers		
Titles to Homes, Autos, Boats, etc..		
Employment Benefits		
Birth Certificates		
Drivers Licenses		
Adoption Papers		
Marriage License		
Location of Safe Deposit Boxes & Keys		
W-2 Forms		
Pay Stubs		
Contracts		
Warranties		
Pictures		
Passports		
Frequent Flyer/ Awards Membership Information		
Audio Files, Video Clips		
Miscellaneous Memberships		