

Financial Vault Checklist



**GENERAL DOCUMENTS**

<input type="checkbox"/>	Social Security Cards	<input type="checkbox"/>	Safe Combination
<input type="checkbox"/>	Birth / Marriage / Divorce Certificates	<input type="checkbox"/>	Safe Deposit Box Numbers
<input type="checkbox"/>	Driver's Licenses / Passport	<input type="checkbox"/>	Safe Deposit Box Location
<input type="checkbox"/>	Adoption Papers	<input type="checkbox"/>	Pre-nuptial agreement
<input type="checkbox"/>	Valuable Property Appraisal Inventory	<input type="checkbox"/>	Military Separation Papers



**INSURANCE AND INVESTMENT DOCUMENTS**

<input type="checkbox"/>	IRAs and 401ks
<input type="checkbox"/>	Non- Retirement Accounts
<input type="checkbox"/>	Annuity Policies
<input type="checkbox"/>	Bank CDs
<input type="checkbox"/>	Checking and Savings Accounts
<input type="checkbox"/>	Life Insurance Policies
<input type="checkbox"/>	Disability Insurance Policies
<input type="checkbox"/>	Health Insurance Identification Cards
<input type="checkbox"/>	Umbrella Liability Policy
<input type="checkbox"/>	Long Term Care Insurance
<input type="checkbox"/>	Property and Casualty Insurance Policies
<input type="checkbox"/>	Veteran's Administration Insurance Papers
<input type="checkbox"/>	List of Account Benefices: Include Names, Relationship, Address, and Phone



**TAX AND LEGAL DOCUMENTS**

<input type="checkbox"/>	Income Tax Returns
<input type="checkbox"/>	Deferred Compensation Agreements
<input type="checkbox"/>	Pension Plans
<input type="checkbox"/>	Annuity Distribution Statements
<input type="checkbox"/>	Promissory Notes for Debts Owed
<input type="checkbox"/>	Trust Documents
<input type="checkbox"/>	Will / Power of Attorney / Advance Directives for Health Care
<input type="checkbox"/>	Motor Vehicle Title / Vehicle Note Statement
<input type="checkbox"/>	Buy/Sell Partnership Agreement
<input type="checkbox"/>	Mortgage Statement / Real Estate Deed