

Legacy Vault Checklist

What should I put in my eMoney vault?

Personal Documents

- Wills
- Deeds
- Revocable & Irrevocable Trusts
- Power of Attorney
- Codicils
- Living Wills/Health Directives
- Prenuptial Agreements
- Buy/Sell Agreements
- Contracts

Insurance Policies

- Life
- LTD
- Disability
- Medical
- Car
- Property

Bank & Investment Statements

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

Employment Benefits

Social Security and/or Veterans Administration Info

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

Medical Records

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