Vital Documents Checklist - Personal Documents

†Do not place the only copy of these documents in a safe deposit box. Safe deposit boxes cannot be easily accessed. In the event of an emergency these documents will need to be in hand. ∞These are the documents considered the most vital in their category. They should be accounted for at all times.

LEGAL - FINANCIAL
- Custody Agreements
- Divorce Decree
- Kids Legal Guardianship Documents™
- Power of Attorney Financial™
- Lease or Rent Agreements
- Letter of Instruction or Intent™
- Marriage Certificate
- Pour Over Will™
- Pre/Post Nuptial Agreement
- Revocable Living Trust™
- Will™

PERSONAL IDENTITY
- Adoption Papers™
- Birth Certificate™
- Citizenship Papers™
- Death Certificate™
- Drivers License: Copy
- Family History
- Fingerprints
- Passport
- Religious Records
- Social Security Card™
- Family History
- Deceased Family Personal Records
- Voters Registration

WORK - PROFESSIONAL
- Diplomas™
- Contract - Current Work
- Military or Government Employment Records
- Pay Stub - Last Each Job
- Pay Stub - Last Each Year
- Professional Accreditations
- Work History Summary

LEGAL, INSURANCE, FINANCIAL
- Advanced Directive™
- Organ Donor Card Copy†
- Insurance Policies™
- Insurance Policy Summaries™
- Insurance Cards Copy†
- Power of Attorney Medical™

PERSONAL
- Family Medical History†
- Personal Medical History†
- Vaccination History†

PET
- Pet AKA Records
- Pet Medical History

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Vital Documents Checklist - Protecting Wealth

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<table>
<thead>
<tr>
<th>TAX</th>
<th>INVESTMENTS</th>
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<tbody>
<tr>
<td>□ Past Tax Returns, Payment Records &amp; Forms∞</td>
<td>□ Account Summaries with Beneficiary Designations∞</td>
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<tr>
<td>□ Nondeductible IRA Records∞</td>
<td>□ Account Opening Application</td>
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<td>□ Advisors Form (ADV)</td>
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<td>□ Certificates of Deposit∞</td>
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<td>□ Savings Bonds∞</td>
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<td>□ Stock Certificates∞</td>
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<td></td>
<td>□ Stock Option Grant Agreements</td>
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<td>□ Treasury Securities∞</td>
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<td>□ Year-End Statements</td>
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<tr>
<th>CASH &amp; CREDIT</th>
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<tbody>
<tr>
<td>□ Cash &amp; Credit Account Summaries with Beneficiary Designations∞</td>
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<tr>
<td>□ Account Opening Application</td>
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<tr>
<td>□ Credit Reports Current</td>
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<td>□ Credit &amp; Bank Cards Copy</td>
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<tr>
<td>□ Letters Closing Accounts</td>
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<tr>
<th>LIFE, DISABILITY &amp; LONG TERM CARE INSURANCE</th>
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<tr>
<td>□ Current Policies ∞</td>
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<tr>
<td>□ Policy Application</td>
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<tr>
<td>□ Policy Summaries with Beneficiary Designations∞</td>
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<tr>
<td>□ Account Opening Application or Plan Agreements</td>
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<tr>
<td>□ Annuity Contracts∞</td>
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<tr>
<td>□ Social Security Earnings &amp; Benefits Statements</td>
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<tr>
<td>□ Pension Records</td>
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<tr>
<td>□ Year-End Retirement Account Statements</td>
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Vital Documents Checklist - Protecting Ownership

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OWNERSHIP
- Asset Summary Current™
- Appraisals
- Safety Deposit Contents™

HOME IMPROVEMENT
- Receipts for Major Mechanicals
- Contractor Invoices + Contracts
- Permit + Inspection Documents

INVENTORY
- Receipts for Big Ticket Items
- Photos/Video
- Room Inventory List Current™

HOME
- LEGAL, INSURANCE, FINANCIAL, OWNERSHIP
- Account Summaries Mortgages & Loans™
- Account Opening Application
- Co-ownership Property Agreement
- Deed™
- Insurance Policies™
- Insurance Policy Summaries™
- Loan Payoff Notices™
- Mortgage Payoff Notices™
- Promissory Note
- Survey
- Settlement Statement
- Title™
- Title Insurance Certificate™

VEHICLE
- LEGAL, INSURANCE, FINANCIAL, OWNERSHIP
- Account Summaries Vehicle Loans™
- Insurance Policies™
- Insurance Policy Summaries™
- Insurance Card Copy
- Lease Agreements
- Loan Payoff Notices™
- Title™