

# Digital Vault Checklist



## Identification & Personal Records

- ☐ Birth Certificates
- ☐ Social Security Cards
- ☐ Passports
- ☐ Driver's Licenses
- ☐ Marriage Certificate / Divorce Decree

## Estate & Legal Documents

- ☐ Last Will and Testament
- ☐ Living Will / Advance Healthcare Directive
- ☐ Power of Attorney (Financial and Medical)
- ☐ Recoverable or Irrecoverable Trust Documents (if applicable)

## Insurance Policies

- ☐ Life Insurance
- ☐ Health Insurance
- ☐ Disability Insurance Coverage
- ☐ Homeowners / Renters Insurance
- ☐ Auto Insurance
- ☐ Long-Term Care Insurance
- ☐ Umbrella Insurance

## Tax Records

- ☐ Last 3 Years of Tax Returns (Federal and State)
- ☐ W-2s, 1099s, K-1s
- ☐ Property Tax Records
- ☐ Year-End Brokerage Statements

## Benefits

- ☐ Social Security Info
- ☐ Veteran's Administration Info
- ☐ Employment Benefits

### The **Traverse Private Wealth** Vital Family Information Packet\*

- ☐ Location of Key Information
- ☐ Safe Deposit Box Inventory List
- ☐ Emergency Contacts (Doctors, Attorneys, Bankers, etc.)
- ☐ List of Assets (Banks Accounts, Brokerage Accounts, Real Estate, etc.)

\*Need a copy of the Vital Family Information Packet? Just reach out!

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A secure, well-organized financial vault gives you peace of mind, helps loved ones in case of emergencies, and ensures efficient wealth and life planning. Use this checklist to collect and maintain the documents you should store in your physical or digital vault.