# VAULT CHECKLIST PROTECT YOUR IMPORTANT DOCUMENTS

A DIVISION OF CARR, RIGGS & INGRAM CAPITAL, LLC

LEVEL FOUR<sup>®</sup>

Prepared For: \_\_\_\_

Date: \_\_\_\_

## **Legal Documents**

Wills

Deeds

Revocable & Irrevocable Trusts

Power of Attorney

Codicils (Supplements made to a Will)

Living Wills/Health Directives

**Prenuptial Agreements** 

**Buy/Sell Agreements** 

Contracts

#### **Insurance Policies**

Life

Long-Term Care

Disability

Medical

Vehicle

Home

Renters

Umbrella

# Property

Titles to Home, Autos, Boats, etc.

Warranties

#### Liabilities

Mortgages

Loans

Taxes

Tax Returns

### **Benefits/Entitlements**

Social Security

**Employment Benefits** 

Veteran's Administration Information

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