



KING wealth planning, inc.
Retirement is a Journey. Let us be your Guide.

Vault Checklist

	Date Uploaded ↓	Expiration Date ↓
Legal Documents		
Wills		
Deeds		
Revocable & Irrevocable Trust		
Power of Attorney		
Codicils		
Living Wills / Health Directives		
Prenuptial Agreements		
Buy / Sell Agreements		

Bank, Investment & Government Statements

Pensions, IRAs, Annuities etc...		
Investment Accounts		
Stock Options / Certificates		
Credit Cards		
Mortgages		
Soc. Sec. and / or Veteran's Admin Info		
Medical Records		
Insurance Policies (Life, Medical, Auto)		
Loans		
Tax Returns		
Information on current & former employers		
Titles to Homes, Boats, etc....		
Employment Benefits		
Birth Certificates		
Drivers License		

Adoption Papers		
Marriage License		
Location of Safe Deposit Box & Keys		
W-2 Forms		
Pay Stubs		
Contracts		
Warranties		
Pictures		
Passports		
Frequent Flyer Awards		
Audio Files, Video Clips		
Miscellaneous Memberships		