

Personal Financial Safe

Whether you are changing jobs, buying a home, planning for your retirement, caring for an ill loved one, or just experienced a death in the family, life events happen when you least expect them, forcing you to desperately search for important paperwork that you may not have seen for many years. Just think of how many documents your bank requires for a home or personal loan. Wouldn't it be nice to have all of your valuable documents at any time or place at your disposal?

The **Personal Financial Safe** enables you to share with your family, investment professional, accountant, attorney, and your executor or executrix the key aspects of your life. We do this by digitally storing all of your valuable documents onto a secure, encrypted, password protected personal website which is accessible by only you and your advisor team. You will now have access to your information anywhere in the world from a single secure location. **The Personal Financial Safe** may be the most important gift you can ever give to your family and loved ones.

Check List of Items to Be Placed In The Personal Financial Safe:

General Items

- Address and phone numbers of key contacts
- Social Security Card
- Birth Certificate
- Passport/Citizenship papers
- Drivers License
- Adoption papers
- Appraisal or inventory of valuable items
- Marriage certificate
- Pre-nuptial agreement
- Divorce or separation papers
- Safe combination
- Safe deposit box(es) and keys (location)

Insurance Documents

- Life insurance policy documents
- Group life policies
- Health and accident insurance ID cards
- Mortgage insurance policy

- Travel insurance policy
- Property & casualty policy documents
- Veterans administration insurance papers
- Beneficiary forms for insurance policies

Tax Documents

- Deferred compensation agreement documents
- Federal/state gift tax returns
- Prior years' tax returns
- Promissory notes (debt owed)

Legal Documents

- Buy/sell partnership agreements
- Property and school tax records
- Real estate deeds and other titles of ownership
- Trust documents on pending legal actions
- Motor vehicle title papers

Investment Documents

- Brokerage account statements
- Mutual fund account statements
- IRA statements
- Company retirement statements
- Stock certificates not held in an account
- Bearer bonds not held in an account
- Alternative investment documents
- Investment club documents/records
- 529 college savings plan statements
- On-line securities plan statements
- Beneficiary forms for IRA's & 401K's
- Documents showing cost basis of securities
- Variable annuity or fixed annuity statements

Bank/Credit Documents

- Checking or money market account statements
- Checks (checking or money market)
- Passbook savings account
- Credit cards and account statements
- Credit union account books or statements . Loans outstanding
- Mortgage documents

Medical/ Emergency Documents

- Living will or health care proxy
- Durable power of attorney
- Financial institutions Power of Attorney forms
- Medical records, prescription plan cards
- Last will and testament
- Military discharge papers
- Burial instructions
- Cemetery plot deed
- Pre-paid cremation documents
- Funeral home preference & information
- Charitable donation preferences
- Letter of instruction to executor
- Death certificate
- Phone number/address of County Court
- Information for obituaries (resume)