



Legal Drawer Checklist

A comprehensive guide to the essential documents you should consider organizing in your private Legal & Financial drawer.



Important Vault Rules

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- **Total Control:** You will be notified immediately whenever your vault is accessed or unlocked. You can relock your vault and remove or appoint delegates at any time via your Vault Manager.

Disclaimer: Not Legal Advice



The information provided in this checklist is for educational and organizational purposes only and does not constitute legal or financial advice. Estate planning laws vary by location. We strongly recommend consulting with a qualified, local attorney to ensure your estate planning documents are legally binding and appropriately tailored to your specific needs.

This is a suggested list. Not every document will apply to your specific situation, but this covers the essentials needed to execute an estate and manage affairs.

Estate & Medical Directives

- Last Will and Testament
- Living Trust Documents
- Healthcare Power of Attorney
- Financial Power of Attorney
- Living Will / Advanced Directives
- HIPAA Authorizations
- Custodian / Guardianship designations for minor children or dependents

Financial & Digital Assets

- Master list of Passwords & Accounts
- Master list of Beneficiaries
- Life Insurance Policies
- Bank & Investment Account Numbers
- Recent Tax Returns (Last 2 years)

Property & Identification

- Real Estate Deeds / Titles
- Vehicle / Boat / RV Titles
- Copies of Birth Certificates

Marriage / Divorce Decrees

Copies of Passports & ID

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