



OCTAGON WEALTH
MANAGEMENT

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Vault Checklist

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

Soc. Sec. and/or Veteran's Administration Info

Insurance Policies (Life, LTD, Disability, Medical, Car, Property)

Medical Records

Bank & Investment Statements

- Pensions, IRAs, Annuities etc...
Investment Accounts
- Stock Options/Certificates

Liabilities

- List of Credit Cards
- Mortgages
- Loans

Taxes

- Tax Returns
- W-2 Forms

Identification

- Birth Certificates
- Drivers Licenses
- Passports

Family

- Adoption Papers
- Marriage License
- Pictures
- Audio Files
- Video Clips

Property

- Titles to Homes, Autos, Boats, etc...
- Warranties

Employment Benefits