

WHAT ITEMS SHOULD YOU KEEP IN YOUR LOCK BOX?



creating and
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wealth

A general rule of thumb on what items you should put in a lock box is: If you can't replace it or it's really expensive to replace, then it should go in the box.

Items to include:

- Social Security Cards
- Passports
- Copy of your last will and testament
- Birth and Adoption Certificates
- Marriage and Death Certificates
- Custody Agreements and Divorce Decrees
- Property Records – Deeds, Property Survey
- Car Titles and other personal property
- Insurance Policies – Life, Home, Auto, Long Term Care
- Healthcare Records – Vaccinations, Hospitalizations
- List of Personal 'Board of Directors' – Attorney, CPA, Financial Planner, P&C Agent, Bankers
- Military Service Records
- Contracts and any other legal paperwork – business buy/sell agreements, professional liability insurance papers
- Paper Stock and Bond Certificates
- Irreplaceable items – family photos, documents, collectibles, jewelry, heirlooms
- Insurance Home Inventory



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If you have any questions, or need help securing your financial future please contact us at (877) 514-9477.

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