Delivery Meeting Checklist

Please bring the following documents with you so we may assist you in setting up your Generational Vault.

STATEMENTS

- [ ] Bank statements from all financial institutions
    - [ ] Checking
    - [ ] Savings
- [ ] Statement on any debts owed
- [ ] Investment statements held with other financial institutions and website logins
    - [ ] Annuities
    - [ ] Mutual funds
- [ ] Brokerage statements
- [ ] Pension plan statements

POLICIES

- [ ] Life insurance policies
- [ ] Long term care insurance policies

DOCUMENTS

- [ ] Estate plan documents
- [ ] Wills
- [ ] Trusts
- [ ] Powers of attorney
    - [ ] Health
    - [ ] Finance
- [ ] Tax returns
- [ ] Any other documents of importance to you

CONTACT INFORMATION

- [ ] Beneficiary contact information
- [ ] Alternate contact information - a person we can contact in case we are not able to get a hold of you due to a change in your contact information
- [ ] Authorized user contact information (if applicable) - a person(s) you authorize to have access your account or contact us with questions about your account

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