

COPPERLINE

WEALTH MANAGEMENT & PLANNING

VAULT CHECK LIST

PROTECT YOUR IMPORTANT DOCUMENTS

Legal Documents

- Wills
- Codicils (Supplements made to a Will)
- Deeds
- Revocable & Irrevocable Trusts
- Power of Attorney
- Living Wills/Health Directives
- Prenuptial Agreements
- Buy/Sell Agreements
- Contracts

Insurance Policies

- Life
- Long Term Care
- Disability
- Medical
- Vehicle
- Home
- Renters
- Umbrella

Property

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

Liabilities

- Mortgages
- Loans

Taxes

- Tax Returns

Benefits/Entitlements

- Social Security
- Employment Benefits
- Veteran's Administration Information

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Sara Schauer mann and Luke McNeely are Registered Representative with Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Level Four Advisory Services LLC, a registered investment advisor. Copperline Wealth Management and Planning, and Level Four Advisory Services, LLC are separate entities from LPL Financial.