



# Methods for Storing Personal and Financial Information

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*Keep your information accessible, while also keeping it safe from theft, fire or for other emergencies.*

*Ensure your trusted loved one knows how to and has the ability to access your information (passwords, location to keys, name on the lock box at the bank)*

*Tell only trust loved ones, who will be handling these details, where your information can be found.*

*There may be a few different places you store information or documents. Just remember to document where those places are located.*

## **WALLET / PURSE**

- Important cards you carry and use. (driver's license, insurance cards, etc.)
  - Suggestion: It is recommended to not carry your Social Security card around with you as it's an easy way for your identity to be stolen.

## **FILE CABINET**

- A locked desk drawer or locked file cabinet can provide a sufficient spot to keep your important documents organized.
  - Keep in mind it isn't as secure as a safe deposit box or anchored home safe.

## **DIGITAL FILES**

- A lot of our information is now stored on your computer / cloud.

## **SAFE DEPOSIT BOX**

- A safe way but not as accessible to you.
- Can be rented form from a bank or credit union.
- Need to ensure your loved ones have access to it after you pass away. The easiest way to do this is to provide access to a designated individual through your rental contract with the safe deposit box holder. Talk to your safe deposit box holder for more details.

## **HOME SAFE**

- Ensure that your home safe is fireproof, waterproof, and has a secure locking mechanism.
- Consider anchoring your safe so burglars can't carry it away.