



Methods for Storing Important Information

(personal • financial • estate documents)

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.