




The following is checklist of important documents that can be stored in your online Vault. Many of the documents listed are examples of information that would need to be located & analyzed in the event of an emergency, disaster, or a death of a family member. These documents can be scanned & stored in the Vault, easily accessible to you and your family anywhere there is internet access. You may provide us these documents in electronic format, you may upload these documents yourself (upon prior approval of Condon Wealth Management, LLC), or you can set up an appointment with our staff to scan you documents at our office.

The Vault allows you to store files of the following types: aifc, aiff, aif, au, avi, bmp, doc, gif, jpg, jpeg, mov, mp3, mpeg, mpg, pdf, png, ppt, ps, qdf, qdfm, qif, rtf, snd, swf, tif, tiff, txt, wav, wma, wmv, wps, xls, and xml.

Type of Document		Notes/Expiration Date
Estate Plan (Wills, Trusts, Powers of Attorney, and Health Care Proxies)		
Deeds & Titles (Home, Car, Boat, etc...)		
Insurance Policies (life, disability, Long-term Care, Medical, Property)		
Banking Information (mortgages, personal loans, etc...)		
Medical and Prescription Insurance Card(s)		
Tax Returns/Tax Information (basis on investments, property, etc...)		
Buy/Sell or Other Business Agreements		
Legal Contracts of Any Kind		
Employment Information (stock options, pensions, agreements, etc...)		
Birth Certificates/Adoption Papers		
Marriage License/Nuptial Agreements		
Passport(s) and Drivers License(s)		
Family History/Family Information		
Special Family Photos (limited to 25 photos)		
Social Security Information		
Personal Property Inventory		
List of Important Documents and Locations		
List of Credit Cards & Phone Numbers		
List of Advisors and Contact Information		
List of Doctors and Contact Information		
Warranties		
Any Other Documents You Want to Store and Protect		