WEALTH MANAGEMENT

your Personal Vault

Organize your financial reality.
For the modern day investor, quickly accessing all your crucial financial information can be difficult. Usernames, passwords, pin codes, account numbers and answers to security questions only you know – all obstacles put in place to protect your financial health. And rightly so.

But how will you and your loved ones access that information in the event of an unexpected death or a natural disaster?

With your **PersonalVault**, a checklist and filing dossier designed around our Certainty Circle of Life holistic planning philosophy, you can strategically archive the information that matters most. Because when the unexpected comes, the last thing on your mind is a username.

Organize your financial reality today.

**My Basics**

**Personal Documents**
Copies of important personal documents
- Drivers License
- Passport
- Social Security Card
- Birth Certificate

**Emergency Contacts**
Contact information for important individuals
- Trusted Family Members
- Trusted Friends

**Homes & Real Estate**
- Security Company Provider and Codes
- Home and Property Titles
- Mortgage Information
- Utility Information including names, contact information & online passcodes
- Home Owners Insurance Policy

**Vehicles / Recreational**
- Details of current vehicles with VIN and License Plate #
- Titles
- Auto Insurance Policy

**Digital Information**
- Social Media Logons
- Passcodes for Miscellaneous accounts

**My Savings**

**Representative Contact List**
- Financial Advisors
- Bankers
- Tax Advisors
- Estate Attorney
- Additional Contacts

**Assets & Liabilities Account List:**
- Names
- Account Numbers
- Contact information
- Online Access Details
Additional Income Sources and Details
- Rental Property Income Details
- Royalties
- Limited Partnerships

My Retirement
Annuities
- Company information including contact information and contract #
- Contract details

Benefits & Pensions
- Employer plans including 401k
- Pension Plans—Company information including contact information
- Social Security Statements

My Protection
Primary Medical Contacts
- List of Primary Medical contacts including contact information
- Information regarding Pertinent Medical History

Insurance including contact information and policy information
- Health Insurance
- Dental Insurance
- Vision Insurance

Advanced Directives
- Healthcare Power of attorney
- DNR Filed with Physician

Medicare, Medigap or Medicaid
- Provider Details
- Coverage Details

Long Term Care
- Company Contact Information
- Policy Information

Life Insurance
- Company Contact Information
- Policy Information

My Legacy
Will’s & Living Will’s
Trust Documents
Power of Attorney
- General Power of attorney
- Financial Power of Attorney
- Durable Power of Attorney
- Healthcare Power of Attorney
Contact Us

To discuss the right investment plan for you, contact your financial advisor. To find a HilltopSecurities advisor near you, call or visit us online at HilltopSecurities.com.

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