

Digital Family Vault

How To Checklist

The Gentreo Digital Family Vault is a safe and convenient way to store all of your estate documents online and together in one place. It ensures that you and your family can easily access and use those documents if something happens. With the Gentreo Digital Family Vault, everyone knows where to turn in the event of an emergency and instant access is always just a few clicks away. The Gentreo Digital Family Vault can store more than just the documents you created through Gentreo, and can actually store many other essential documents that you might need in an emergency.

You cannot predict the future, but you can plan for it, and the Gentreo Digital Family Vault ensures that you are always prepared.

Before You Start:

1. Gather your estate planning documents, insurance policies, and other information
2. Prepare an asset list and other documents that supplement your estate plan (i.e. your Will)

What to Store in Your Digital Vault

Life Insurance Policy

While it is not necessarily part of your estate plan, a life insurance policy is extremely important to have access to in the event that you passed away. Without instant access to your life insurance policy, your family will have to deal with insurance companies and potential legal battles to gain access to your benefit. By uploading your life insurance policy to the Gentreo Digital Family Vault, you can ensure that your family will have immediate access if your policy is needed.

Medicare, Medicaid, and other Insurance Cards

Insurance cards, such as Medicare, Medicaid, or any other health insurance cards, are extremely important to have available if something were to happen to you. If you were ever incapacitated, it would be important that your family has access to this information quickly to ensure that you receive the proper treatment in a timely manner. Your COVID-19 vaccination card is another item that you may want to store here. Physical copies can be lost or misplaced, which is why uploading them to the Gentreo Digital Family Vault is very important.

Birth Certificates or IDs

If you have any forms of identification, you can upload them to the Gentreo Digital Family Vault. Important IDs such as a birth certificate, your driver's license, or a legal identification card can be kept in the Vault to ensure that you have a backup if something were to happen, and so your family can access them in an emergency. Unfortunate situations occur, and physical identification and birth certificates can be lost in many ways, which is why it is important to keep a digital copy safe and ready.

Other Important Documentation

It is easy to upload any documentation that you would like stored and shared in the Gentreo Digital Family Vault. If you have important passwords or credentials that you would like your family to have access to, or even just special instructions for your family that are not covered in your estate plan, they can be uploaded and shared. You may want to store your funeral wishes, any funeral planning you have done, and memorial videos, stories, or photos for loved ones. You can also store instructions for how to access private keys for cryptocurrency, NFTs, and other digital assets.

The Gentreo Digital Family Vault gives you the peace of mind that any documents or information that you or your loved ones might need to access in an emergency are available without hassle, but stored securely in the meantime.

Next Steps



Upload your documents to your Gentreo Digital Family Vault

Uploading your documentation to the Gentreo Digital Family Vault allows you to access, edit, and share your document any time, and ensures that it is ready when you need it most.



Share vault access with your loved ones & agents

By providing your loved ones with access to your Gentreo Digital Family Vault, you ensure that they have instant access in the event of an emergency. You wouldn't want to put yourself or your finances at risk because your family cannot access the necessary documentation. You can choose who can access which documents, and you can add or revoke access at any time.



Update Documents as Needed

Update your documents as needed, when life circumstances change, live events happen, or laws in your state change. Gentreo is with you every step of the way. It is important that all of your information stays current to ensure that you are prepared if you need access to your documentation.

With the Gentreo Digital Family Vault, everyone knows where to turn in the event of an emergency and instant access is always just a few clicks away.