

Top five ways the Key Wealth Direction® Vault makes securely storing documents easy

If you only had a few moments in an emergency to gather up belongings in your home before leaving, what would you take? The list likely includes family mementos, like boxes of photos handed down from parents and grandparents. You might also reach for documents such as your Social Security card, passports, and other vital information.

For many people over this last year, that what-if question became an unfortunate reality: From raging forest fires to powerful tropical storms and hurricanes, the U.S. has seen unprecedented weather events that have forced people from their homes and their communities, sometimes with only a few moments of warning.

Having a place to store all your vital documents online can go a long way toward providing peace of mind – and not just in emergencies. Key Wealth Direction's Vault can help you organize and protect your documents safely and securely.

Here are some of the top benefits of using this digital vault, along with helpful tips about how to make the most of this feature provided to Key Private Bank clients.

Get better organized

When you access your customized, digital portal in Key Wealth Direction, you'll see an area marked "Vault." Within the vault, you can store as many scanned documents as you'd like. This can include everything from legal documents, like wills and powers of attorney, to real estate deeds and car titles, along with other information that's easier to access digitally, including health insurance plans and even medical treatment documentation. You can categorize your digital folders just as you would paper ones in a file cabinet. But unlike physical files that can get lost or disorganized over time, it's simple to review, catalogue, and update your online folders.



TIP

Not sure where to start? Your financial team can help you identify various documents you may want to include. You can also bring documents and any other items you want scanned to a member of your team and they'll upload them for you.

Capture family memories

Flipping through old scrapbooks with your family can be a great way to share stories and feel connected to one another. Safeguard these prized photos by uploading them into the vault. Beyond scanning these photos, you can also upload them using your smartphone. Take pictures of the images with your smartphone, and then simply add them into the vault through the Key Wealth Direction app.



TIP

Make scanning and adding images into the vault a family activity. You may find you have even more photos than you first realized.

Travel safer

When you travel abroad it's recommended that you make a copy of your passport for safekeeping. It's proof of your identity and citizenship you may need if your actual passport is lost, stolen or misplaced for any reason. While you could make a copy of your passport to leave with a trusted family member or friend, or in a personal lockbox, if you need to obtain a copy while traveling it can be challenging. With the vault, you can access your passport anywhere you have Wi-Fi.



TIP

Check the expiration date of your passport when you scan it in. Set a reminder in your smartphone several months before your passport expires so that you can submit your renewal forms. Then remember to upload your most current passport into the vault.

Easy access to legal documents

Once your documents are scanned and organized in the vault, finding what you need becomes a matter of a few clicks on your laptop or smartphone. For example, if you need to provide a copy of one of your children's birth certificates for them to participate in sports or apply to schools, or if you needed to check tax documentation from several years ago, it's simple to pull up that information.

TIP

Consider keeping the physical copies of legal documents in a banking lockbox versus in your home. If you do store them in your home, make sure it's in a fireproof, locked box.

Share securely

Through your vault you can provide legal documents to members of your financial team. Key Wealth Direction is protected through some of the most sophisticated encryption technology available. Plus,



the information within it is non-transactional, meaning it's less of a target for online hackers who are more interested in tapping into accounts where they can drain financial assets. There's no money exchanged or accessed in Key Wealth Direction.

TIP

Create unique passwords for your login and don't share those with anyone. You can grant access to your Key Wealth Direction account to family members.

Access to your own digital vault is just one of the many advantages you'll receive through using Key Wealth Direction.

To learn more about maximizing your personalized online portal, [talk to your Key Private Bank Advisor today.](#)

Key Private Bank



Top five ways Key Wealth Direction's Vault makes securely storing documents easy

2 of 2

Any opinions, projections or recommendations contained herein are subject to change without notice and are not intended as individual financial or investment advice. Investment products are:

NOT FDIC INSURED • NOT BANK GUARANTEED • MAY LOSE VALUE • NOT A DEPOSIT • NOT INSURED BY ANY FEDERAL OR STATE GOVERNMENT AGENCY