Guide to: Accessing my documents.

Before retirement, people start thinking about important documents and how they might need them in retirement.

These are the areas most people start to consider:

Wills and powers of attorney.

Do they have up to date wills and powers of attorney set up to help ensure key decisions can be made if needed, and that personal wishes are clearly recorded, in a Memorandum of Wishes?

Access to funds and accounts?

Having access to funds and knowing how to withdraw funds when needed, is something people check when thinking about retirement.

Paying everyday bills if something happens.

Insurance, bank and investment account authorities are another area people consider, to help them in times of illness or uncertainty.

Simplifying money?

Reviewing subscriptions and regular payments is a simple task people may do when getting ready for retirement. They may ask if some of the payments are just a habit, and of no real use any longer.

Access to important documents?

People consider which documents may need to be accessed and by whom. They will make sure key people know where to find those documents.

Funeral wishes?

This may be something people consider while they are still healthy and able to be clear about their wishes. Once written down, the funeral wishes need to be filed with the other 'important documents'.

To explore further, visit the website to find:

- A simple explanation of your options at 65.
- How NZ Superannuation fits alongside your savings.
- A checklist to help you get ready, at your own pace.

Visit for simple guides, checklists and next steps.

www.angfincare.nz

A steady way forward:

Many people find this stage is less about doing everything at once and more about becoming aware of what is already in place.

These resources are here to help you take the next step, one topic at a time.

Investment Knowhow. Christian Values.

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