

Guide to: Managing my documents.

In retirement, people like to know that if something should happen, people can step in and help them manage their money.

These are the areas most people want peace of mind with:

What happens if I am unwell?



Some people begin thinking about whether trusted individuals could step in if needed and whether permissions or arrangements are clear. It might be time to talk to a lawyer about enduring powers of attorney.

Should my spouse or partner be involved?



People may start considering how each person would manage the finances if the other was unable to. It might be time to talk to each other about where the money goes.

How would someone know what bills to pay?



People sometimes think about how to make their regular financial commitments visible or understandable to someone else if needed. Who should be 'in the know'?

How do I deal with technology as I get older?



As technology progresses, some people may be wondering how they might keep up and maintain their access to everything. Is it time to do a 'tech for seniors' course?

How can I make things easier for everyone?



Once people have been in retirement for a few months, they may take another look at how they could simplify life, payments and documents. Is it time to get regular bills onto direct debit or automatic payments?

Are my wishes clear?



When retirement settles down, when living arrangements and the bigger picture are clearer, people may look again at wills and powers of attorney. It is time!



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:

At this stage, people are getting used to living in retirement slowly, and working out what documents to update and when.



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

Investment Knowhow.
Christian Values.

P 0508 738 473
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Christian
KiwiSaver Scheme