

Guide to: Preparing my documents.



With retirement close, people move from awareness to checking they have important documents in order.

These are the areas most people start to consider:

What will I need to apply for NZ Super?



People may want to know what documents are required when they apply for NZ Super, so they have time to collect them together. Go online to workandincome.govt.nz/eligibility/seniors

Updated identification documents.



Key documents such as passports and drivers licenses may be expiring, and the year before retirement may be time to update them.

SuperGold Card or Community Services Cards.



These cards can provide valuable discounts for people aged 65+. Knowing how to apply and how they work can be a priority for some people. Go online to workandincome.govt.nz/eligibility/seniors

Getting access online to services.



Many services are applied for online (NZ Super). This time can give people an opportunity to learn how to use the services, and ask for help if they need to. Paper forms are still available, for those unable to apply online.

How can I make things easier for myself?



The year before retirement can be a trigger to do a 'spring clean' of old documents that are no longer needed.

Take a step back and look at the bigger picture.



Preparing for retirement can give people a chance to take a step back, and ask some bigger questions about what is important to them in life.



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 gives them time to think through the documents they may need in the next year or so.



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

**Investment Knowhow.
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