Checklist: Starting with confidence.

A checklist of key areas often reviewed as retirement begins and attention shifts to how income, spending and daily life are working together.

These are some key items to tick off:

NZ Super status.

✓ Confirm NZ Super payments have started or are in place or, if there is a different pension provider, confirm all the paperwork has been done.

KiwiSaver access status.

✓ Check how to access KiwiSaver funds,and consider whether savings are sitting in the correct ‘buckets’ for the long term, medium term, and short term requirements.

Income and spending flow.

✓ Review how income sources align with spending patterns.

Savings drawdown approach.

✓ Look at how savings are being used over time.

Document readiness.

✓ Confirm key legal and financial documents are current and accessible.

Legacy direction.

✓ Review overall direction for time, relationships and financial legacy moving forward.

To explore further, visit the website to find:

- How people start getting their documents in order.
- How NZ Superannuation fits alongside your savings.
- The role KiwiSaver may play in retirement.

Visit for simple guides, checklists and next steps.

www.angfincare.nz

A final thought:

Retirement often becomes clearer over time, as income, habits and priorities settle into a new rhythm of life.

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

Investment Knowhow. Christian Values.

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Christian KiwiSaver Scheme