# Checklist:
# Preparing for the transition.

## A checklist of key areas often reviewed as retirement comes into closer focus and decisions about income, timing and organisation begin to take shape.

These are some key items to tick off:

### NZ Super access details.

✔ Check with Work and Income on how NZ Super is applied for, when to apply, and when payments would begin, and what other pension providers there are, if you are ineligible for NZ Super.

### KiwiSaver access rules.

✔ Review with your provider how KiwiSaver can be accessed and what options are available.

### Retirement income setup.

✔ Look at how NZ Super (if eligible), savings and other income sources may be structured in retirement.

### Expected spending levels.

✔ Compare current spending with likely retirement spending needs.

### Key documents location.

✔ Confirm where key documents such as wills, insurance and accounts are stored.

### Family discussion points.

✔ Review topics for upcoming conversations with family about future plans, including for enduring powers of attorney.

---

### 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:

This stage is often about turning awareness into structure, so there is clarity around what retirement may look like in practice.

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

**Investment Knowhow. Christian Values.**

**P** 0508 738 473
**E** info@christiankiwisaver.nz
**W** www.angfincare.nz

Christian KiwiSaver Scheme