Checklist:
Getting clarity before retirement.

This quick checklist highlights common areas people review in the years leading up to retirement. Start by getting clarity on where things are at and what may need attention over time.

These are some key items to tick off:

NZ Super eligibility and timing.

✓ Check eligibility requirements, including the expected NZ Super (or other pension provider) start age, and how it aligns with retirement plans.

KiwiSaver position.

✓ Review current KiwiSaver balance, fund type, and contribution settings.

Total savings overview.

✓ Get a clear view of total savings and investments across all accounts, including KiwiSaver.

Existing debt position.

✓ Review any remaining debt and current repayment commitments.

Future income sources.

✓ Look at potential sources of income in retirement, including NZ Super (if eligible).

Initial legacy direction.

✓ Identify initial thoughts on how time, money and energy may be used in future years, and which elements of these future things should be reflected in a will.

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:

At this stage people spend time thinking about ideas, before they need to start taking action.

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

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