

Plan B document

What you need to know if I'm not here.....



| The essentials..... | Me | You | The business |
|----------------------|----|-----|--------------|
| Email address | | | |
| IRD numbers | | | |
| ACC numbers | | | |
| Employer | | | |
| KiwiSaver | | | |
| Internet banking # | | | |
| IRD online services | | | |
| Vehicle registration | | | |

| Provider | Contact details | Member/username/ policy number |
|-----------------------|--|-----------------------------------|
| For example..... | RIVAL Wealth Tim Fairbrother 06 370 4441 | ABC1234 |
| Landlord | | |
| Phone/mobile | | |
| Electricity | | |
| Gas | | |
| Rates | | |
| Sky | | |
| Fuel card garages | | |
| Internet/wifi | | |
| School & teacher(s) | | |
| Child/day care | | |
| Plumber | | |
| Electrician | | |
| Mechanic | | |
| NZTA - rego & RUC | www.nzta.govt.nz | |
| Accountant | | |
| Accounting software | | |
| Doctor | | |
| Bank current accounts | | |
| Bank contact/manager | | |
| Rainy day fund | | |
| | | |

| Provider | Contact details | Member/username/ policy number |
|-------------------------------------|-----------------|-----------------------------------|
| Debt Management | | |
| Home loan | | |
| Credit card(s) | | |
| Hire purchase(s) | | |
| Car finance | | |
| Business loan | | |
| | | |
| General insurance | | |
| House and contents | | |
| Car | | |
| Boat etc | | |
| Business liability | | |
| | | |
| Estate planning | | |
| Wills/EPA, blue folder | | |
| Guardians | | |
| Trustees | | |
| Lawyer | | |
| Specified items | | |
| Shareholder, buy/sell agreements | | |
| | | |
| Personal insurance | | |
| Income cover | | |
| Private medical | | |
| Life cover etc | | |
| | | |
| Savings/investments | | |
| Kids KiwiSaver(s) | | |
| Term deposit | | |
| Shares | | |
| Managed funds | | |
| Other/education fund | | |

Important note: You should not record important passwords here. Consider digital online storage facilities such as Perpetual Guardian's 'myDigitalVault'. This has been purpose built to store digital copies of personal papers such as your Will, birth certificates, passport, insurance policies or passwords. You retain ongoing access through a secure login. As a client of RIVAL Wealth we can store copies of your documents online, however, we will not store passwords