

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. A comprehensive disclosure statement is available any time free of charge 04/20