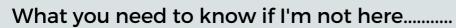
Plan B document





The essentials		
Provider	Contact details	Member/username/ policy number
For example	RIVAL Wealth Tim Fairbrother 06 370 4441	ABC1234

Provider	Contact details	Member/username/ policy number
Debt management		
General insurance		
Estate planning		
Estate planning		
Personal insurance		
Savings/investments		
mportant note. You should not record	important passwords here Consider digital online storage facilities such	as Pornetual Cuardian's

'myDigitialVault'. 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. RIVAL Wealth is a Financial Advice Provider. Our disclosure document is located at rivalwealth.co.nz or a written copy is available on request. 06/2022