

Provider	Contact details	Member/username/ policy number
Debt management		
General insurance		
Estate planning		
Personal insurance		
Savings/investments		

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. 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