

Plan B document

What you need to know if I'm not here

The essentials	Ме	You	Business
Email address			
IRD numbers			
KiwiSaver			
Vehicle rego			
Bank accounts			

Provider	Contact details	Member/username/policy number
For example	RIVAL Wealth Tim Fairbrother 06 370 4441	ABC123

Provider	Contact details	Member/username/policy number
Debt management		
Insurance details		
Savings/investments		
Estate planning		

Important note: You should not record important passwords here. Consider digital secure online facilities. RIVAL Wealth is a Financial Advice Provider. Our disclosure document is located at rivalwealth.co.nz or a written copy is available on request.