Start here

Who to call first, who knows where this planner is, and what is in it

This planner is general information for New Zealand, not legal advice.

This planner was prepared from your answers. It is where you write down what your family would otherwise have to go looking for: who to tell, where the accounts and papers are, and what you would like done.

Fill it in at your own pace, by hand or on screen, and come back to it whenever something changes. Nothing you write in it reaches us.

Every fact we print carries the date we read it. A fact we could not confirm, or one we have not checked recently, is left out rather than guessed.

If something has happened, the first person to call

Name _____ **Phone** _____

Write them in by hand or type them on screen. The same name and number go on the cards at the back.

Who knows where this planner is

Name _____ **Phone or email** _____

Name _____ **Phone or email** _____

Last brought up to date _____

Notes

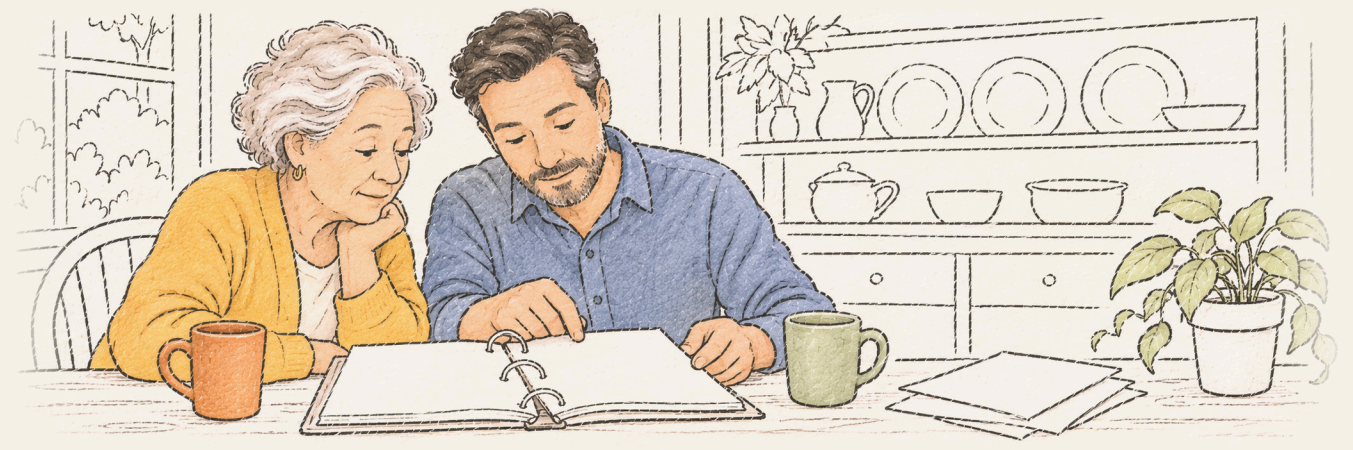
_____

_____

_____

I · Your records

Six sheets for what your family would otherwise have to go looking for.



Who to tell



The people and organisations that should hear first: family and whānau, your executor, your employer, your doctor, your lawyer if you have one.

1 **Name** _____ **Relationship or role** _____

Phone or email _____

2 **Name** _____ **Relationship or role** _____

Phone or email _____

Notes

_____

_____

3 **Name** _____ **Relationship or role** _____

Phone or email _____

4 **Name** _____ **Relationship or role** _____

Phone or email _____

5 **Name** _____ **Relationship or role** _____

Phone or email _____

6 **Name** _____ **Relationship or role** _____

Phone or email _____

7 **Name** _____ **Relationship or role** _____

Phone or email _____

8 **Name** _____ **Relationship or role** _____

Phone or email _____

