

# Life Organiser - Outline

## Why did we develop this service?

- If your home was destroyed, do you have copies of all of your essential documents?
- Do your family know where to find your insurance policies, vehicle ownership papers, etc?
- Do you have your phone, electricity and other household service suppliers' details all in one place?
- Have you documented your funeral wishes?

We all know we need to have our affairs documented and in order, but as it seems such an onerous task how many of us get around to doing it? We have developed the Life Organiser to help you make this happen.

The Life Organiser is a central register for all matters relating to you. It has been developed to assist you in managing your affairs and to make sure you have all of your important information documented, and backed up electronically. It includes your personal, financial, property, insurance and business details.

Although most people find it unpleasant to think about the possibility of disability or death, advance planning like this can reduce potential distress for loved ones, who will be responsible for managing your affairs.

## Who should have a Life Organiser?

If you don't have your affairs documented and collated in a central point, then we recommend that you use this service.

## What is involved?

You will be given an electronic Life Organiser template (a Microsoft Word document) that will become the register for all of your essential documents. Together we will set a timeframe for completing your Life Organiser, which fits around your commitments. We will give you a follow up call to see how you are progressing with completing your life organiser.

Upon completion of your Life Organiser we will store the information electronically in a safe and secure manner. We can also provide you with a printed folder for your information. Each year when we review your annual accounts we will refer to the Life Organiser to highlight any areas you may wish to update.

## When should I purchase a Life Organiser?

We recommend that you begin using this service as soon as possible, as you never know what is around the corner. Imagine the peace of mind and the time you will save when you have all your essential documents stored in a central place.

***Call us now on 09 421 9020 to discuss preparation of your Life Organiser.***



## Benefits of a Life Organiser

- Makes you take action to document all your affairs so they are easier to manage
- Saves time and hassle in terms of 'looking for documents', as you have a central register to collate all material
- Ensures that your personal details and final wishes are documented
- Makes sure that your insurance cover is in accordance with your needs and can be accessed readily
- Both physical and electronic copies of your documents are kept, so they can be accessed and updated easily
- Peace of mind knowing you are prepared should something unexpected happen
- Security knowing that a backup of all of your documents is stored at <<Firm Name>>
- Continual access to experienced service and support from our Team, who will have access to review your Life Organiser at any time
- There will be less distress for family when dealing with your affairs should you become unable to