



Quay Life Organiser - Outline

Why we developed this service?

The Quay Life Organiser has been developed to be a central record for all matters relating to you, designed to assist you in managing your affairs. It includes your personal, business, financial, property, and insurance details.

We all know we need to have our affairs documented and in order, but how many of us get round to making it happen, as it seems such an onerous task. Quay Accountants will work with you in a step by step process to help you take action to complete your Quay Life Organiser.

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

Who should have a session?

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

What is involved?

You will have four 45 minute review meetings, which will be facilitated by Quay Accountants.

The key issues covered will be:

- Personal and Family Details
- Financial – Business and Personal Details
- Property and Insurance Details
- Final Review and Identifying Milestones that will require the Organiser to be updated

We will provide you with "Homework", which will need to be completed prior to each Meeting to ensure you have collated and documented all relevant details. From this we will then identify any issues that need to be addressed in the meeting and deal with any queries or concerns you may have.

You will be given a Quay Life Organiser Folder that will become the register for all your essential documents. We will also save all the information electronically that we will keep on file and give you a copy. Once completed as part of your annual accounts review we will refer to the Quay Life Organiser to highlight areas that need to be updated.

When should I have a session?

We recommend that you begin this service as soon as possible, as you never know what is round the corner. Imagine the peace of mind when you have all your essential documents stored in a central place, and know they have been reviewed by a professional advisor.

Call Jeanette now on 07 308 4414 (Whakatane) or 07 578 6069 (Tauranga) to discuss preparation of your Quay Life Organiser

Benefits of a Quay Life Organiser

- Makes you take action to document all your affairs so they are easier to manage
- You will save time and hassle in terms of “looking for documents”, as you have a central register to collate all material
- Any potential areas of risk/lack of cover to you or your family will be identified and highlighted to you
- It will ensure that your personal details and Final Wishes are documented
- You can rest assured that your Insurance cover is in accordance with your needs and can be accessed readily
- Both physical and electronic copies of your documents are recorded, so they can be accessed and updated easily
- You can have peace of mind knowing you have planned for your future
- You have security knowing that a back-up of all your documents are stored at Quay Accountants
- You will have continual access to experienced service and support from our team, who will have access to review your Life Organiser at any time
- You will have regular review milestones as life goals change
- There will be less distress for family when dealing with your affairs should you become unable to