

A Checklist For New Parents

Getting Started

A new mommy and daddy's work is never done. Along with raising your bundle of joy (and trying to find time for sleep) you've also got some major planning to do.

This checklist includes the following:

- Important Contacts: Keep your family connected.
- Will: Naming a Guardian is a must now that you have something more valuable than material possessions.
- Life Insurance: How will your family get by financially if something happened to you? If you have a policy, let them know where it is.
- Power Of Attorney: A POA has power over everything involving your finances. Share who you named or remind yourself to name one.
- Health Directive & Important Documents: Your family needs to carry on, even after you're gone. Share your medical decisions, financial basics, and other things that will keep your household running smoothly.

IMPORTANT CONTACTS

- Emergency Name/Info: _____
- Work Name/Info: _____
- Your Doctor Name/Info: _____
- Pediatrician Name/Info: _____
- Financial/Accountant Name/Info: _____
- Insurance Agent Name/Info: _____
- Lawyer Name/Info: _____
- Other Name/Info: _____

WILL

- I Don't Have A Will But I Need One
- Completed

Location of Will: _____

Executor (Name/Contact): _____

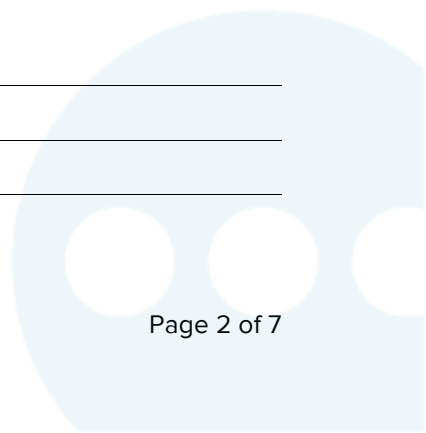
Guardian (Name/Contact): _____

Date Created/By Whom: _____

Notes:

- I Don't Have Or Want A Will

Why? We promise we're not judging you! But you might want to explain your decision so your family knows why you didn't want to create a Will.



LIFE INSURANCE

I Don't Have Life Insurance But I Need It

I Have A Stand-Alone Life Insurance Policy

Type (circle one): Term | Permanent: Whole | Permanent: Universal | Other

Company: _____ Agent: _____

Location of Policy: _____

Policy #: _____ Expiration Date (If Term): _____

Beneficiaries: _____

Notes (Example: Riders you may have on this policy):

I Have Life Insurance Coverage Through My Job

Type (circle one): Term | Permanent: Whole | Permanent: Universal | Other

Human Resources Contact: _____

Policy Info: _____

Notes:

I Don't Have, Want, Or Require Life Insurance

Notes (Example: You don't believe in it; The Term policy you had lapsed and you didn't renew):

POWER OF ATTORNEY

I Need To Name A POA

I've Named A POA

Type (circle one): Durable | Non-Durable | Springing | Don't Know/Not Sure

POA Name/Contact Info: _____

Location Of Official Document: _____

Date Created/By Whom: _____

Notes:

I Don't Have Or Require A POA

ADVANCE DIRECTIVE

I Need To Create An Advance Directive

I Have An Advance Directive

Location Of Official Document: _____

Name Of Health Care Proxy: _____

Date Created/By Whom: _____

Notes:

I Don't Have An Advance Directive And Don't Want To Create One

Why? (The default for medical treatment is to keep you alive at all costs; if that's what you want, let your loved ones know):



IMPORTANT DOCUMENTS/PAPERWORK

Financial Info

Primary Bank: _____

Account Type(s): Savings | Checking | Investments | Mortgage | Loan | Safe Deposit Box | Trust | Other

Notes:

Secondary Bank: _____

Account Type(s): Savings | Checking | Investments | Mortgage | Loan | Safe Deposit Box | Trust | Other

Notes:

Credit Cards (circle all that apply): AmEx | Discover | Mastercard | Visa | Other

Notes:

Investments

Company/Institution Name: _____

Notes:

Titles/Deeds

Property Deed/Lease Location: _____

Auto Title/Lease Location: _____

Other Property/Vehicles: _____



Insurance

Health Insurance Provider: _____

Acct. #/Other Info: _____

Car Insurance Provider: _____

Acct. #/Other Info: _____

Home Insurance Provider: _____

Acct. #/Other Info: _____

Other Insurance: _____

Acct. #/Other Info: _____

Around The House

(Include company providing the service and contact info if applicable.)

Electricity: _____

Gas: _____

Water: _____

Phone: _____

Cable: _____

Internet: _____

Cleaning Service: _____

Garbage Collection: _____

Heating Oil: _____

HVAC: _____

Home Security: _____

Septic: _____

Landscaping: _____

Exterminator: _____

Plumber: _____

Electrician: _____

Other: _____

Other: _____

