

New Baby Checklist for Wisconsin Parents

*Important Legal, Financial & Practical To-Dos
During Baby's First Year*



IMPORTANT DOCUMENTS

- ☐ Obtain your child's birth certificate.
- ☐ Order 2-4 certified copies of the birth certificate.
- ☐ Confirm your child has received a Social Security number.
- ☐ Store important documents in a secure location.

HEALTH & INSURANCE

- ☐ Add your child to your health insurance plan.
- ☐ Confirm coverage is active.
- ☐ Select and establish care with a pediatrician.

FINANCIAL PLANNING

- ☐ Open a 529 education savings plan.
- ☐ Consider setting up automatic monthly contributions.
- ☐ Share 529 gifting information with grandparents and family members.
- ☐ Open a savings account for your child (if desired).

MEMORY & LEGACY PLANNING

- ☐ Create an email account for your child to save photos, memories, and milestones.
- ☐ Organize digital photos and important family records.
- ☐ Start a memory book, journal, or baby keepsake file.
- ☐ Add your child to the Green Bay Packers season ticket waiting list.



ESTATE PLANNING

- ☐ Create or update your will.
- ☐ Create or review your revocable trust.
- ☐ Name guardians for minor children.
- ☐ Review beneficiary designations on:
 - Life insurance
 - Retirement accounts
 - Transfer-on-death accounts
 - Pay-on-death accounts
- ☐ Update financial powers of attorney.
- ☐ Update health care powers of attorney.
- ☐ Consider whether a trust is appropriate for your child's inheritance.

EMERGENCY PLANNING

- ☐ Discuss guardian choices with those you wish to nominate.
- ☐ Make sure trusted individuals know where important documents are located.
- ☐ Consider a Wisconsin Power of Attorney Delegating Parental Powers for temporary caregiving situations.

You're not in this alone.

If you've recently welcomed a child, are expecting a baby, or would like to review your existing estate plan, contact HKK Law Offices to schedule a **free initial consultation** with one of our estate planning attorneys. We're also here to provide guidance on a wide range of estate planning and family law matters.



Sheboygan Office

608 N 6th St. Sheboygan, WI 53081



Random Lake Office

400 1st St. Random Lake, WI 53075



Mequon Office

1017 W Glen Oaks Ln, Suite 105
Mequon, WI 53092

Speak with an attorney **in-person** at one of our office locations, over the **phone**, or via **video conference**.

Free Initial Consultation



+1 (920) 457-4800

HKKLAWOFFICES.COM