NewDadLife

FREE CHECKLIST

The new dad due date checklist

Tick off the work, family, legal and insurance papers before the baby arrives

Do one box at a time. Write the dates and names in the blanks so your partner can find them. General information, not legal, tax or financial advice.

Work papers

- [ ] Email HR about leave: paid or unpaid, how many weeks, who is eligible, how to request it
- [ ] Ask for the deadline to add the baby to the health plan, in writing
- [ ] Ask whether group life coverage continues during leave
- [ ] Ask who pays benefit premiums if pay drops during leave
- [ ] Put the leave start and end dates in a shared calendar

Leave starts on

Leave ends on

Health plan deadline for the baby

HR contact name and phone

Family and legal papers

- [ ] Choose a guardian and ask them
- [ ] Meet an estate attorney about a will that names the guardian
- [ ] Check beneficiary forms at work and on retirement accounts
- [ ] Name a primary and a contingent beneficiary, not the baby

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- [ ] Decide who can act for you if you are unavailable

Guardian

Backup guardian

Estate attorney and phone

Life insurance papers

- [ ] Write down the mortgage balance, debts and savings
- [ ] Run the DIME worksheet and note a coverage range
- [ ] Pick a term length: youngest child's independence, mortgage end, retirement
- [ ] Gather ID, doctor and medicine names, addresses and your partner's details
- [ ] Ask for a free quote and compare insurers
- [ ] Book any health exam at least a month before the due date
- [ ] Confirm the policy is in force and the premium is on autopay

Coverage range

Term length in years

Policy number

Insurer phone for claims

Hospital bag money tasks

- [ ] Photograph both insurance cards, front and back
- [ ] Plan the baby's Social Security number request and birth certificate
- [ ] Keep the folder with policy numbers where your partner can open it
- [ ] Save the HR, agent, attorney and pediatrician numbers in your partner's phone

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The first week list

- [ ] Text the people on your call list
- [ ] Tell HR about the birth
- [ ] Add the baby to the health plan before the deadline
- [ ] Update beneficiary forms
- [ ] Put a reminder in the calendar for three months from now

> Short bursts beat a last week scramble. One box a day is enough.

Sources

- U.S. Department of Labor: Family and Medical Leave Act
  www.dol.gov/agencies/whd/fmla
- HealthCare.gov: Coverage if you recently gave birth
  www.healthcare.gov/what-if-im-pregnant-or-plan-to-get-pregnant/
- SSA: What is enumeration at birth
  www.ssa.gov/faqs/en/questions/KA-10041.html
- NAIC: Life insurance consumer guide
  content.naic.org/consumer/life-insurance.htm

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