

Your Post-Baby Financial Checklist

A calm, printable place to keep the important next steps together.
Work through it a little at a time.

Checklist overview

- ☐ 1. Confirm your baby's health coverage
- ☐ 2. Review leave, pay, and employer benefits
- ☐ 3. Rebuild the household cash-flow picture
- ☐ 4. Check beneficiaries on key accounts and policies
- ☐ 5. Review life insurance and family-protection questions
- ☐ 6. Make sure identity documents are moving forward
- ☐ 7. Flag tax questions for the year your baby arrived
- ☐ 8. Review legal documents and emergency information
- ☐ 9. Revisit your emergency savings target
- ☐ 10. Decide what does not need attention yet

Start with what changed.

Choose the item with a real deadline or the biggest potential disruption first.
Leave the rest for another day.

Your 30-minute review

Use this page to choose what needs attention now and what can wait.

First 10 minutes: urgent deadlines

- ☐ Health coverage / enrollment
- ☐ Leave or benefit forms
- ☐ Bills or employer deadlines

Next 10 minutes: current cash flow

- ☐ Expected income for the next month
- ☐ New or changed essential expenses
- ☐ Any immediate gap that needs a plan

Final 10 minutes: protection and paperwork

- ☐ Beneficiaries and life insurance
- ☐ Legal / emergency documents
- ☐ Tax questions to review later

My first next step
