



# 5 Legal Documents Every New Parent Should Have

## 1. LAST WILL AND TESTAMENT

- Name a guardian for your child
- Choose an executor you trust
- Outline how assets should be distributed
- Store in a safe, accessible place

**Why it matters:** Without a will, courts decide who cares for your child and how your assets are divided.

**Tip:** Without a will, Pennsylvania courts decide guardianship and asset distribution based on state law—not personal preference.

## 2. POWER OF ATTORNEY (POA)

- Assign someone to handle financial/legal matters if needed
- Specify limits or instructions
- Ensure it's durable and revocable

**Why it matters:** If you're temporarily incapacitated, someone you trust can step in.

**Tip:** Choose someone responsible and communicative. You can revoke or update this document anytime.

## 3. ADVANCE HEALTHCARE DIRECTIVE

- Create a living will with your treatment preferences
- Name a healthcare proxy
- Discuss your wishes with your proxy

**Why it matters:** Ensures your medical choices are honored if you can't speak for yourself.

**Tip:** Discuss your values with your chosen proxy. It's not just about procedures—it's about peace of mind.

## 4. TEMPORARY GUARDIANSHIP AUTHORIZATION

- Choose a short-term caregiver
- Define start/end dates and powers
- Include emergency contacts

**Why it matters:** Lets someone legally care for your child during travel, illness, or emergencies.

**Tip:** This is especially helpful for single parents or families with complex schedules.

## 5. BENEFICIARY DESIGNATION & TRUSTS

- Update beneficiaries on insurance and retirement accounts
- Consider a trust to manage assets for your child
- Review and revise regularly

**Why it matters:** Directs assets efficiently and protects your child's financial future.

**Tip:** Trusts can avoid probate and offer more control over how and when your child receives assets.



### READY TO START?

Let's Build Your Plan Together.



Schedule Your Personal Intake Session and contact us directly on 484.547.0614



Email us at:

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