

CHECKLISTS



Legal Checklists for Life's Big Moments:

Marriage, Birth, Retirement, and More—Your Guide to Planning with Confidence



Let's Plan What Matters Most—Together

If you're navigating a life transition, **Van Horn Law** is here to help. [Schedule a consultation](#) today and take the next step with clarity and confidence.

 Serving Allentown and surrounding Pennsylvania communities

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Marriage Checklist

Start your life together with clarity and care.

- Update beneficiaries on life insurance, retirement accounts, and bank accounts
- Create or revise your will
- Consider a prenuptial agreement (especially for blended families or business owners)
- Review health care directives and powers of attorney
- Understand property ownership laws in Pennsylvania

 Personal Notes:

Birth or Adoption Checklist

Protect your growing family with thoughtful planning.

- Name a guardian in your will
- Create or update your estate plan
- Consider a trust to manage assets for minor children
- Review life insurance coverage
- Apply for a Social Security number

 Personal Notes:

Retirement Checklist

Plan for peace of mind in your next chapter.

- Review and update your will and trust
- Confirm beneficiary designations
- Consider long-term care planning and Medicaid eligibility
- Update powers of attorney and living wills
- Explore asset protection strategies

 Personal Notes:

Other Milestones

Life changes—your legal documents should too.

- Review your estate plan after divorce
- Understand custody and support changes
- Update documents when buying or selling property
- Plan for caregiving responsibilities

 Personal Notes:



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