



THE PGA FOUNDATION

ESTATE PLANNING CHECKLIST Have you thought about your Estate Plan? Do you have one?

- | | YES / NO |
|--|----------|
| 1. Do you have an updated will or living trust? Date: ____/____/____ | _____ |
| 2. Does your will name a guardian for your minor children if you and your spouse are deceased? | _____ |
| 3. Do you have a designated executor(s) and/or trustee(s)? | _____ |
| 4. In order to avoid probate of assets in your trust, do you have a living trust? | _____ |
| 5. Is your and your spouse's estate plan taking advantage of federal estate and gift-tax exemptions? | _____ |
| 6. Are you taking advantage of the \$11,000 annual gift-tax exclusion? | _____ |
| 7. Does your estate plan anticipate potential changes in tax law? | _____ |
| 8. Have you considered a charitable remainder trust or other charitable estate planning vehicle? | _____ |
| 9. Do you have a durable power of attorney, living will and health-care proxy? | _____ |
| 10. Are you sure you have the right amount/type of life insurance? | _____ |
| 11. Are you sure your estate plan is up to date and takes into account tax-saving strategies? | _____ |
| 12. Have retirement assets or company stock been fully considered in your estate plan? | _____ |

These answers may assist your advisors in finding the types of personal trusts that can help you reach your estate-planning goals. Please consult with your financial and legal advisors on any estate planning.