

Estate Planning for Your Pets

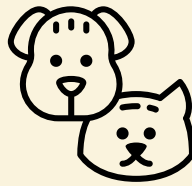


A workbook designed to
help you plan for your pet's
care when you die





If you own a pet, you need to make sure your pet will be taken care of when you die.

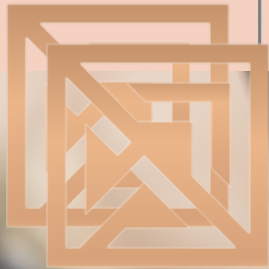


Did you know that pet care is a part of estate planning?

In this workbook, you will learn how you can plan for your pet



**Ready to learn
how?**



SCHWEIZER
&
SCHWEIZER
ASSOCIATES
ASSOCIATES



WAYS TO PLAN FOR YOUR PETS



- You can create a Pet Trust in your Will
- You can leave your pet to a person of your choosing in your Will
- You can leave a detailed letter explaining who should care for your pet when you die

Notes:



Is a Pet Trust Right for you?



Do you want to be sure your pet will go to
whomever you choose? ☐



Do You want more control over what
happens to your pet? ☐



Do you want to make sure your pet will not
be taken to an animal shelter? ☐



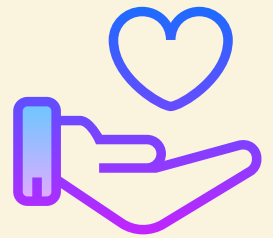
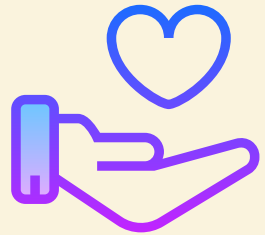
Do you want to leave money for the care of
your pet? ☐

YES!

Then a pet trust may be for you



Two Types of Pet Trusts



-
- Traditional Pet Trusts
 - Statutory Pet Trusts

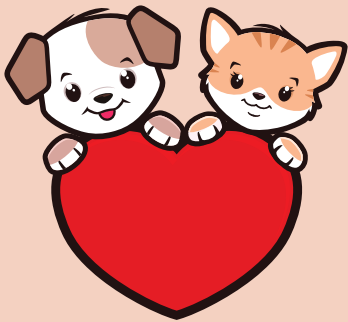


Traditional Pet Trusts



Traditional pet trusts are effective in all states.

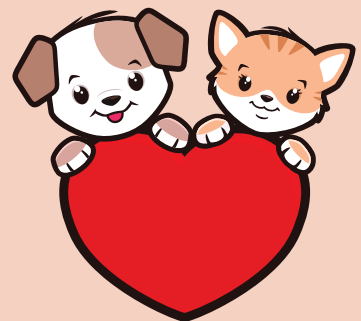
- You choose the Caregiver for your Pet
- You choose the Trustee who may be the same person as caregiver
- You decide whether to leave a set amount of funds to care for your pet during its lifetime
- You can specifically state how you want your pet to be cared for; what you want done for your pet; what needs your pet has; etc.
- If no one is available to care for your pet, then you can instruct your executor to find a suitable, loving, caring home for your pet
- You can specifically prohibit your pet from being taken to an animal shelter or the pound
- You state who gets any leftover funds in the trust when the last pet dies
- The trust directs the trustee to provide funds to the person who is providing care to your pet after you die by paying for the pet's expenses according to your directions.



Pet Trust

=

Greater Control



Statutory Pet Trusts



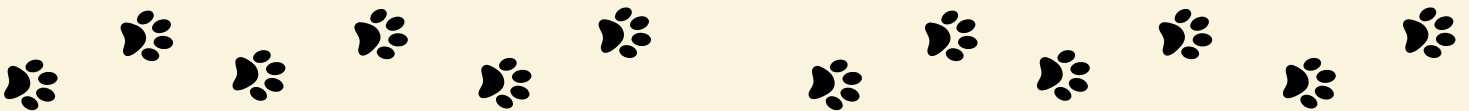
Authorized in 44 states, including North Carolina



Can be a simple statement



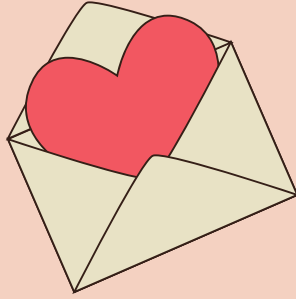
"I give my pet, Rover, to my daughter, Jane"



*Less control over your pet's care



Another option is to leave a written letter



Pros:

- Name whom you want to care for you pet when you die
- Can include instructions for care



Cons

- Your wishes do not have to be honored
- No enforcement

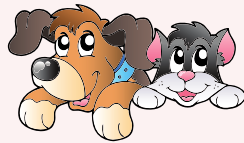


QUESTION & ANSWER WORKSHEET FOR PET CARE



Who do I want to take care of my pet when I die?

A large rectangular area with horizontal lines for writing answers.



What should my pet's caregiver know about my pet?

A large rectangular area with horizontal lines for writing answers.



How do I want to designate care for my pet - Pet trust? Statement in will? Handwritten letter?



What standard of care do I expect? Pet's routine? Sleeping Arrangements? Playtime?

Health of my pet: Medications? Health concerns/issues? Health care needs? Allergies?



Lined area for writing pet health information.



Special instructions for my pet's caregiver?

Lined area for writing special instructions for the pet's caregiver.

If you need help setting up a plan for your pets:



Contact Kristen Mackintosh, The Happy Lawyer

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