



# Planning Ahead

## Quick Guide to Planning Ahead for Your Pets

When thinking about planning ahead, sometimes, we forget to consider our pets. But thinking ahead to make sure that your pets are cared for, especially in case of an emergency, can give you piece of mind. This Quick Guide covers practical steps you can take to plan ahead to care for your pets.

### Short-Term Care for Your Pets

If something unexpected happens, like an accident, illness, or emergency, your pets might be forgotten. For example, if you were to be in a car accident on your way to work, and you were taken to the hospital unconscious, would someone be able to take care of your dog. Planning ahead could help family, friends, or even emergency professionals care for your pets while you are unable to. These are key steps to help you plan ahead:

#### **1. Identify a person or people you trust**

Make a list of people who could look after your pets while you are away, like family members, friends, or neighbors you trust. Talk to one or more of them ahead of time to see if they are willing and able to take care of your pets. Be clear about what you are asking and make sure that you are on the same page. For example, if you were unavailable for a few days, would you want the person you trust to care for your pet at their home or yours?

#### **2. Create a Pet Directive for Each of Your Pets**

Write down all the important details about each of your pets and keep this document in a place that is easy to find. If you have chosen caretakers for your pets, consider giving them a copy. This document will help them know everything they need to properly care for your pets.

A pet directive should contain:

- Basic details, including pet's name, any nicknames, breed, birthday, gender, and photo;
- Medical information such as their health condition and records;
- Vet details like the hospital's address, phone number, and vet's name;
- Dietary information, such as brand/type of food and any supplements; and
- Information on your pet's habits, behavior around others, and training rules

Care instructions could include:

- How often to feed, water, and walk your pet each day;
- Any grooming needs your pet has and how often to clean the litter box;
- Where you keep their food, medicine, and accessories, etc.; and
- Any other important information or special instruction you want the caretaker to know.

GoodTrust is a resource that includes a pet directive in their estate planning tools. For people interested in purchasing a subscription to GoodTrust, they offer a 30% off discount code: [mygoodtrust.com/signup?promo=trriage30](https://mygoodtrust.com/signup?promo=trriage30).

#### **3. Carry a Pet Alert Card in Your Wallet**

A pet alert card is a useful tool to have in case of an emergency where you cannot communicate. It lets the police or emergency responders know that you have pets at home. Include your address, and your emergency caretaker's name and phone number, so they can quickly reach out to the person you identified to take care of your pets.

## 4. Post an Emergency Contact Note in Your Home

Make an emergency contact note with the name(s) and phone number(s) of your pet's emergency caretaker(s), along with a note about where your pet portfolio is located. Put this note somewhere easy to spot in your home, like on the fridge or by your front door.

## 5. Arrange for the Caretaker to Access to Your Home

Arrange for the caretaker to enter your home while you are away by giving a spare key with a family member, friend, or trusted neighbor. Or, if you live in an apartment building, get permission from the management for your caretaker to enter and take care of your pets while you are away.

## 6. Check Pet Boarding Facilities or Shelters

If you do not have anyone who could help care for your pets in an emergency, look into pet boarding facilities (like pet hotels), shelters, or charities that may be able to provide short-term care for your pets. You may be able to make arrangements with a facility to care for your pet in an emergency. Then add this information to your pet directive and pet alert card in your wallet.

## Long-Term Care for Your Pets

It can also be helpful for you to include instructions on the long-term care of your pets in your estate plan. Depending on your needs, you could consider one or more of these options:

### 1. Informal Agreements

If you have a trusted family member, relative, or friend who is willing to care for your pet if you are no longer able to, you can make a simple agreement with them. This can be oral or written, and you do not need a lawyer. However, these agreements are not legally binding. So, if the caretaker changes their mind later, they are not legally obligated. Also, if you want to leave money for your pet's care, making a will or setting up a pet trust, discussed below, can be better options. If you decide on an informal agreement, it is important to:

- Choose a reliable person as the caretaker;
- Talk to them to ensure they are committed to caring for your pets; and
- Have a backup plan with different caretakers in case your first caretaker is not available.

### 2. A Will

In a will, you cannot leave money or other assets to your pets because legally, pets are seen as "property" and cannot own anything. But you can name one or more caretakers of your pets in your will and leave the caretaker(s) money to look after your pets. But it is important to know that even if you leave a caretaker money, they are not legally required to care for your pets.

For example, Amy made a will stating that she leaves her dog, Dolly, to her friend, Bill, and \$1,000 to Bill for taking care of Dolly. After Amy's death, Bill becomes the owner of Dolly and receives \$1,000. But, if Bill gives Dolly away and keeps the \$1,000, Bill would not be legally liable for not caring for Dolly.

That is why it is important to pick a caretaker who you trust. But, if you want to make sure the money is used only for your pet's benefit, you should consider a pet trust.

If you decide on a will, these are some important things to think about:

- Name backup caretakers in case the first caretaker is not available.
- Be specific, mentioning each pet's name, breed, and full name of the caretaker you have chosen for each pet.
- Set aside a reasonable amount of money for pet care.
- Consider having a third person oversee the money to make sure it is used properly;
- Give the caretaker copies of your pet directives. While not legally binding, they can be helpful.
- Also, remember that probate, the process for handling wills, can take time. So, it is smart to plan for your pet's care until the probate process is complete.

### 3. A Pet Trust

A pet trust is a legal document, where you pick a person, known as a trustee, to manage money for your pet's care. A trust can start as soon as you create it or when you pass away. With a pet trust, you can:

- Put aside money for your pet's care and pick a trustee to manage it.
- Choose one or more caretakers for your pets. The trustee and caretaker can be the same person or different ones. It may be helpful to choose backups, in case the first trustee or caretaker is not available.
- Give specific instructions for your pet's care.
- After your pets pass away, you can choose to donate any leftover money to charity.

A pet trust gives stronger protection for your pets because it legally requires the caretaker to follow your instructions. If they do not, they can be held accountable. But setting up a pet trust can be more complicated and expensive. Visit [TriageHealth.org/State-Laws](https://TriageHealth.org/State-Laws) for legal resources in your state.

### 4. Rescue Groups or Animal Shelters

If you cannot find someone to take care of your pets, some rescue groups and shelters might help by finding them a new home or caring for them. They might charge a fee or ask for a donation. Before you give your pet to one of these organizations, make sure you gather all the important details. Visit the organization to see how they treat the animals, learn about their background and reputation, and understand the adoption process in case someone wants to adopt your pet from them. To find a local shelter or rescue near you, visit: [chewy.com/g/animal-shelters-and-rescues](https://chewy.com/g/animal-shelters-and-rescues).

**For more information about estate planning, visit [TriageHealth.org/Estate-Planning](https://TriageHealth.org/Estate-Planning), [TriageHealth.org/Quick-Guides/Checklist-GettingOrganized](https://TriageHealth.org/Quick-Guides/Checklist-GettingOrganized) and [TriageHealth.org/Estate-Planning-Toolkit](https://TriageHealth.org/Estate-Planning-Toolkit).**

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