



Pet Planning Checklist

For Tennesseans & Their Families

Planning isn't just about "big assets." It's about the loved ones who depend on you—including your pets. A solid plan ensures they are cared for during unexpected emergencies and for the rest of their lives if you are no longer there. Use this checklist to create a safety net for your beloved companion.

If you want to discuss further or move forward with planning, contact me to schedule a strategy session today at (423) 596-7220 or hello@nancycogar.com. Also, make sure to follow the [Boomer Time with Nancy Cogar podcast](#) so you won't miss future episodes.

I'm working hard to advocate for you and your furry and feathered loved ones.

Nancy A. Cogar, Esq.



Pet Planning Checklist

Emergency Planning - For the Unexpected

This section covers short-term emergencies, such as a sudden hospitalization or accident.

- Create Written Instructions for Your Home:**
 - Type up and tape a prominent note on your refrigerator or inside your front door.
 - Include:** Your pet's name and type (e.g., "Max the cat, Buddy the dog"), food location, care instructions (feeding schedule, litter box location), and your veterinarian's contact information (e.g., "Vet: Dr. Smith, ABC Animal Clinic, (555) 123-4567").
- Prepare a Wallet Card or Medical ID:**
 - Carry a card in your wallet or with your personal identification.
 - It should state:** "I have pets at home that need care if I am hospitalized. Please contact [Trusted Friend's Name] at [Phone Number]."
- Arrange for Emergency Home Access:**
 - Give a spare key, garage code, or other means of access to a trusted friend, neighbor, or family member.
 - Ensure this person knows your pet's feeding schedule, medication needs, and basic routine.

Long-term Planning - For the Expected

This section covers lifetime care for your pet in your estate plan.

- Identify and Confirm a Caregiver:**
 - Identify a primary person who could take your pet long-term.

- Identify at least one backup caregiver in case the primary person cannot fulfill the role.
 - Crucial Step:** Have a frank conversation with your chosen caregiver(s). Confirm they are genuinely willing and able to take on the responsibility. Do not just assume.
- Decide How to Structure Your Plan:**
- Informal Arrangement:** Write down your wishes, detailing who you want to take your pet. Acknowledge that this is based on trust and is not legally binding.
 - Bequest in Your Will:** Include a clause in your will leaving your pet to a specific person, along with a sum of money for their care (e.g., "I leave my dog, Daisy, to my neighbor, Linda, along with \$3,000 for Daisy's care."). Understand this money legally becomes the person's property and they are not required to spend it on the pet.
 - Pet Trust (Recommended):** Create a legally enforceable Pet Trust, either within your will or as a separate trust document. This offers the most protection. A trust allows you to:
 - Formally designate a **caregiver**.
 - Appoint a separate **trustee** to manage the funds.
 - Allocate specific **funds** for care.
 - Outline detailed **care instructions** (diet, medical needs, routines, favorite toys).

Planning Alternatives

If you do not have a friend or family member who can take your pet, consider these options.

- Research Local Rescue Groups:** Some organizations have "lifetime care" or continuing care programs.
- Look into Animal Sanctuaries:** Find reputable sanctuaries that care for pets whose owners have passed away.
- Explore a Paid Caregiver Arrangement:** Speak with your attorney about structuring a plan within a Pet Trust to pay a designated caregiver for their services.

Final Action Steps: Your To-Do List

Don't leave your pet's future to chance. Take these final steps.

- ✓ Write down your wishes today. Start with the emergency instructions.
- ✓ Talk to your family or chosen caregiver.
- ✓ Decide if you will leave funds and how much you can afford. Any amount helps.
- ✓ Schedule a time to review or update your estate plan to officially include your pet.

Your pets give you unconditional love. Planning for their future is the ultimate final gift you can give them in return.

