

A close-up photograph of a white dog, possibly a Weimaraner, lying down on a light-colored, textured surface. A small tabby cat is resting its head on the dog's face, near its eye. The dog's head is turned slightly to the right, and its eyes are closed. The background is a plain, light-colored wall.

Estate Plan for Your Dogs or Cats? How to Protect Them

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Let Me Introduce Myself...

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- B.A. in Psychology, Clark University
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- *LL.M. (Master's of Law) in Elder Law, Stetson University*

Let Me Introduce Myself...

Amy L. Griboff

- Attorney at Law since 2003
- Member, National Academy of Elder Law Attorneys (NAELA)
- Member, Estates and Trusts Section and Elder Law Section, Maryland State Bar Association (MSBA)
- Admitted to the Bar in MD and DC
- Written articles for NAELA and MSBA

Agenda

- Why plan for our pets?
- How can we plan for our pet?
- Don't Forget!
- Questions and Answers



Only 7-9% of individuals plan for their pet

<https://epiloguewills.com/learn/pet-guardianship/who-will-care-for-my-pets-when-i-die>

<https://www.everplans.com/articles/places-that-will-take-care-of-your-pet-if-something-happens-to-you>



Why do we need to plan for our Pets?



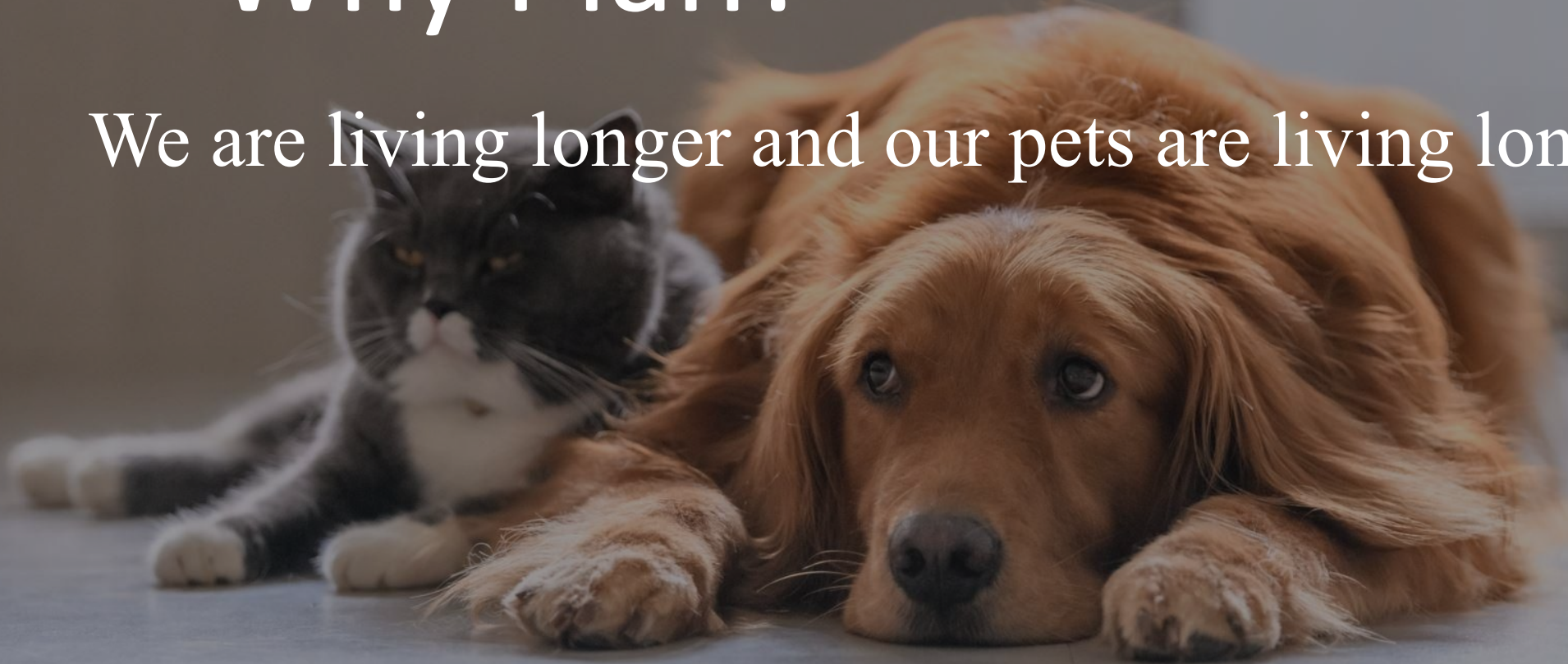
Why Plan? Life Happens

- Emergency;
- Downsize;
- Unable to care for pet; or
- Death



Why Plan?

We are living longer and our pets are living longer



How can we plan for our pets?



Financial Power of Attorney (POA)

- POA doesn't just manage your money
- POA from internet won't have pet provisions



Agent needs “Power” to:

- take pet to vet for care
- approve medical care
- board pet
- hire someone to:
walk and feed pet



Last Will and Testament

1

Leave Pet to individual who will care or find a home

2

Leave \$\$ for individual either outright or in trust

3

Leave \$\$ to get pet rehomed, shots, and/or for their care

Revocable Trust

- Revocable Trust operates in case of disability and at death
- No delay when you die
- **One Provision** addresses who cares for pet and \$\$ for caregiver



Stand Alone Pet Trust

Why use a Stand-Alone Trust?

- Operates in case of disability and at death
- Care of animal is going to be for a long time
- Care of animal is costly (e.g., horse)
- No delay when you die



Terms of Pet Trust

- Identify pet and future pet
- Trustee of Trust
- Caregiver (same or different than Trustee)
- \$\$ - consider pet's age, health, estimated lifespan
- Beneficiary after passing of pet



Terms of Pet Trust Continued

- Instructions on care
 - Food, grooming, medical care, toys
- Cremation, burial, and memorial
- Court may determine too much \$\$ in trust and require it be paid to successor beneficiary



Don't Forget

- Back up Plan
- Assess and re-assess situation
- Ask permission of pet caregiver or rescue organization



Don't Forget

- Key to your house to get your pet
- Emergency box at front door



Pet Checklist:

1. Veterinarian information
2. Shots (i.e., rabies)
3. Does your animal have a microchip
4. Disease or Illness
5. Medicine
6. Daily Routine
7. Favorite treat



Questions and Answers



Thank you!

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A stylized graphic of the words "Thank You" in a handwritten font, surrounded by short, radiating lines that give it a sunburst or starburst effect.