



## **Pet Survivor Plan**

### *Planning for Your Pets' Future*

Your pets are your family – and providing for their care after you pass or become incapacitated is critical to your peace of mind as you and your family navigate end-of-life plans. The League for Animal Welfare's Pet Survivor Plan (PSP) is a formal arrangement between the League and you, to provide sheltering, care, and love to your pet(s) upon your death or incapacitation. The Pet Survivor Plan ensures that your pet will receive quality care and a loving advocate at the most vulnerable and stressful time in their lives.

### *Enrolling in the Pet Survivor Plan*

Enrolling in the Pet Survivor Plan involves the following steps:

- Informing the League of your intent to include us in your end-of-life plans. We will provide you a tour of the facility, so you can feel comfortable about your pet(s)' care; and have you fill out a survey so we can get to know you and your pet(s).
- Complete, sign, and date an Enrollment Agreement and submit it to the League for Animal Welfare with a \$100 enrollment fee.
- Complete and submit a pet profile for each pet to be included in the program, and include any medical records you have for your pet; update these records annually with the League.
- Specify in your Power of Attorney, Will, Trust, or Pet Trust that in the event of your death, permanent disability or incapacitation, you wish to place your pet(s) in the custody of the League for Animal Welfare, thereby making the League for Animal Welfare the legal guardian of your pet(s).
- Designate the League for Animal Welfare as a beneficiary of \$5,000 or more per pet to cover the costs of medical care, food, shelter, and other expenses for your pet(s) while in our care.
- Designate a Pet Advocate to communicate with the League upon your death or incapacitation. This can be a friend, relative or the Trustee/Executor of your estate. Your Pet Advocate will inform the League of your death or incapacitation and help transport your pet(s) to the League. You will be asked to provide the name and contact information for your Pet Advocate to the League, and update that information as needed.
- Keeping the League updated about you and your pets. The League wants to provide the best possible care for your pet(s), and consistent communication helps us do that! Annually, we will ask you to update any information about your pet(s) – updated health records, notes on their behavior, new likes/dislikes, and any changes in your health status, your pet(s)' status, or your Pet Advocate's status.

### *Your Pet(s)' Future*

The League will become your pet(s)' custodian when you are no longer able to care for them (at the time of your death, permanent disability or incapacitation). Your pet will come to the League, and receive daily love and care; regular veterinary check-ups; and regular check-ins to make sure they are coping with their loss and transition well. Your pet(s) will be loved and cared for at the League until they are able to transition into a new adoptive home. Though we are not able to take requests about your pet(s)' adoptive families, the League is careful to match pet(s) with families that are a good fit for their needs and lifestyle; and we keep in

communication with adoptive families to ensure your pet(s) remain safe and loved. Should your pet(s) adoptive family be unable to care for them at any time, the League always welcomes your pet(s) back to the League.

### *Financial Considerations*

There is a flat \$100 fee (regardless of the number of pets) to enroll in the Pet Survivor Plan, to be paid at the time of enrollment and document completion; and a \$10 annual fee to process your Pet Profiles. There are no other fees associated with enrollment; but the League does require a minimum \$5,000 per pet to be paid at the point that the League becomes the custodian of your pet(s). This gift will cover the daily and veterinary care for your pet(s) while they are at the League. If your pet is known to have a medical condition that will likely exceed this minimum, the League will establish that expectation of care as you enroll in the PSP.

If you elect to establish a Pet Trust, you may also choose to include a provision and financial allowance for continued care of your pet(s) when they find an adopter – the League will administer that allowance by direct payments to the company, office, or organization providing your pet(s)' care (the financial allowance will not transfer to the adopter, unless you have directed otherwise).

Should your pet(s)' care exceed your financial allowance, the League will still provide exemplary care for your pet(s) while they are under our care, and we expect the same from our adopters. If your pet(s)' care does not require the full fee, any remaining funds will support the League for Animal Welfare's work in placing thousands of animals in loving homes (the League should be named as the remainder beneficiary in the event the funds are not exhausted).

### *Frequently Asked Questions*

#### **Why should I enroll my pet in the Pet Survivor Plan?**

Public care options for your pets are very limited. If you do not have a plan for your pets, whoever is established to handle your affairs will have to figure out a plan for them. If no such person is designated, emergency responders are typically tasked with securing your pets. This may include relinquishing them to the local, municipally-established, open-admission shelter in your area (for dogs); or simply letting them outside, to fend for themselves (for cats); or having them euthanized at a veterinarian's office. This happens to tens of thousands of pets every year. Many of these are the pets of people who hoped and assumed that their family members would take over their pet(s)' care, but their family and friends were unable to fulfill or unaware of these wishes.

Your pet(s) are already facing the fear and grief of losing the one person they know and trust; they deserve to have this transition be planned and as seamless, stress-free, and loving as possible.

#### **How much does it cost to enroll in the Plan?**

There is a flat, \$100 fee to cover the administrative costs to enroll in the Plan; a \$10 annual fee to register your Pet Profile(s); then, upon the League taking permanent custody of your pet, your financial Power of Attorney, executor and/or trustee will need to pay the League a minimum of \$5,000 per pet from your estate/trust or you must provide a minimum of \$5,000 per pet for your pet's care in your Will, Trust or Pet Trust and designate the League as the beneficiary of \$5,000 or more per pet in your Will, Trust or Pet Trust.

#### **Can I designate more than \$5,000 for my pet(s)' care?**

Yes. As part of a trust, you can designate additional funds to help the League care for your pet to ensure that all medical and emotional needs can be met by your Pet Trust. Any remaining funds will support the League's efforts to provide loving care for homeless animals.

You can also designate funds to help a new adoptive family with the care for your pet(s). Those funds will not be disbursed directly to the adopter (unless you designate it as such), but will be used by the League to make direct payments to veterinary offices, or other companies/organizations providing care for your pet.

If you have senior pets, or pets with chronic medical conditions that you know will require additional care, we do ask that you take that into account when establishing your Pet Trust and provide accordingly.

### **Can I give an additional gift to the League?**

The League gratefully accepts any additional gifts to help care for the thousands of homeless animals we shelter each year. You can set these up as donations to the League, separately from your Pet Trust. Contact us to learn more about joining our planned giving Plan, the Legacy Society.

### **I don't have \$5,000 – how do I ensure my pet(s) are cared for after my death?**

If you know you want the League to provide care for your pet(s), you can establish a Trust that is funded by other assets (real estate; stock; life insurance policies).

If you know you want to plan for your pets, but are not ready to set up a Pet Survivor Plan with the League, we recommend:

- Identifying a friend or family member who can take over care of your pet(s). Make sure to notify them of your wishes; make sure they are willing and able to take on that responsibility; have access to all your pet(s) medical records; and are notified immediately if something happens to you. We recommend making this a formal plan with a legal contract, if you are able; or, at least, set the agreement down in writing, to make sure all parties agree to the relationship. Please understand, though, that if the friend or family member is unable or unwilling to take over care of your animal when the time comes, there is no legal way to compel them to do so, and the fate of your animals will be in limbo.
- If you do not have a friend or family member who can take over care of your pet(s), we recommend creating a document for your pet(s) that is kept in an easily-accessible location in your home. The document should include: names and pictures of your animals; all up-to-date medical information about your pet(s) (vet records, vaccination history, etc); and any notes about their behavior, temperament, likes/dislikes that could help a shelter find them a new home. Make sure that friends, family members, and emergency responders can easily locate this document and know of its existence.
- Microchipping your pets, so that they can be easily identified by anyone caring for them after your death.

### **How should I designate the \$5,000 gift to the League for my pet's care – in a will, trust, power of attorney?**

As part of the Pet Survivor Plan, the League will accept a power of attorney; will; trust or pet trust; or a contractually-agreed payment at the time of need.

The advantage of designating the gift in your will is that it requires no special documentation (above-and-beyond your standard will), and can be included with simple language as part of your broader estate plans. If you already have a will, this is an easy and inexpensive way to include these plans. The gift will have to go through probate before it is disbursed to the League (we will accept the pet(s) prior to disbursement so long as we have a copy of the pertinent section of the will).

The advantage of a power of attorney, trust, or pet trust is that it avoids any delays in distributing assets (it does not have to go through the probate process); and it can be implemented if you become permanently disabled or incapacitated (not just at the time of death). A power of attorney, trust or pet trust must be established with an attorney, and so there is an additional expense associated with its drafting.

Like a trust, the advantage of a contractually-agreed payment is that it can be paid immediately at the time of need (rather than go through probate); and can be implemented if you become permanently disabled or incapacitated. The contractually-agreed payment is entered into directly with the League, and does not require any additional documentation devised in concert with an attorney. If you opt to designate the gift in this way, the League may ask for additional contact information for your Executor as that will be the primary way for the estate to settle the contract with the League.

If you have further questions about which estate plan is right for you and your pet(s), we recommend contacting your estate attorney or financial planner; or you may direct questions to the Executive Director at the League.

### **What happens to my pet if I move into assisted living or can't physically care for my pet before my death, and they are enrolled in the Pet Survivor Plan?**

You should specify in your Power of Attorney, Trust or Pet Trust, or the contractually-agreed plan with the League that in the event of your death, permanent disability or incapacitation, you wish to place your pet in the custody of the League thereby making the League the legal guardian of your pet.

We recommend that you create a Durable Power of Attorney who can help facilitate your pet(s)' transfer to the League and distribution of a financial gift for their care if you become unable to do so.

### **What does care of my pet look like after they come to the League?**

Your pet will come to the League, where we will address any medical needs immediately; and we will assess if they have any special needs to help them deal with the loss of their owner and their transition to the League. This process takes place in our intake and isolation areas in our facility, which is a calm place for your pet to acclimate to the change.

Once they have received a clean bill of physical and mental health, your pet(s) will be available for adoption. They will be housed in our adoption areas – for dogs, spacious kennels with indoor/outdoor access and daily physical and mental enrichment; for cats, open rooms with access to “catios” and lots of vertical space for relaxing. Pets receive daily love and care from our staff, medical team, and volunteers. Should any medical or behavioral needs arise during their time at the League, they will be taken care of immediately.

The League's Adoption Counselors will help find your pet(s) an adoptive family that fits their unique needs. The profiles you will submit to the League about your pet(s) temperament and likes/dislikes will help us make a great match for your pet(s).

### **What if my pet has a physical or behavioral issue that makes it difficult to find a home?**

If your pet(s) have a medical or behavioral condition that may need special consideration, the League will discuss this with you as part of the enrollment process. The League will work with your pet(s) to help them overcome any conditions that may make it hard for them to transition into a new home; and we will work diligently to find them a home that understands, accepts, and cherishes your pet(s) with whatever conditions they may have. Your pet will be lovingly cared for at the League until that adoptive home is found. If your pet(s) have a condition that the League does not have the capacity to handle or to safely rehome your pet(s), we will alert you immediately during the enrollment process.

### **Can I request that pets be placed together, or make designations about my pet's adoptive family?**

If you are establishing a Pet Trust and have specific instructions for your pet(s)' care or future status, please notify the League immediately to discuss those terms. We will do our best to accommodate any care items that will make your pet(s) feel safe and get the care they need; but we may not be able to meet all needs. These should be discussed with the League as you set up your Pet Trust.

### **What if I have additional pets at the time of my death that are not enrolled in the Pet Survivor Plan?**

The Pet Survivor Plan is done by enrollment per pet, so if you add a new pet to your family, please notify the League so we can enroll them! We will do our best to accommodate other pets in the home, but cannot guarantee placement if we are not aware of them and have not enrolled them in our PSP.

### **What if my pet's care costs more than \$5,000?**

During the enrollment process, and annually thereafter, the League will discuss any special medical or behavioral conditions your pet(s) may have that require additional care. If, during these discussions, we determine that your pet's care is likely to exceed the usual contribution of \$5,000, we will notify you of any additional costs you should anticipate in your estate planning.

If your pet's care is more expensive than you or we anticipated before the League took guardianship, the League pledges to, nonetheless, give your pet the best standard of care, even if that exceeds the financial allowance made for their care.

**If my pet dies before me, can I transfer his or her Pet Survivor enrollment to another pet?**

The enrollment process is unique to each pet – as part of the process, we will get to know you and your pet and their unique needs. If a pet dies, then that will automatically end their enrollment in the Plan. If a new pet enters the family, the League is happy to enroll the new pet and get to know them and their needs.