



Protect Your Pets

How to Successfully Include Animals in Your Will or Trust

by BROOKE CLEARY MCDERMOTT

It's no wonder people consider dogs to be "man's best friends" — with daily walks, cuddle time on the couch, special meals, and precise grooming care, they really do become part of the family. Dogs (plus cats and other pets, too) are often considered a first, second, third, or fourth child; however, even though they receive loving care during their owners' lifetime, they are often unknowingly left out of their owners' wills and trusts. Whether in anticipation of incapacity or passing away, pet owners should seriously consider including their pets in their estate planning.

Luckily, there are a number of excellent options available for the care of your family pet. These options range from re-homing your pet with a trusted family member or family friend to using an organization that is willing to accept and assist with the placement of your pet to creating a trust for the benefit of your pet. All of these are excellent options and offer a solution to the question of who should care for your pet once you are no longer able to do so yourself.

Which option is right for you will depend on a number of factors, including time, expense, and complexity.

The least expensive and simplest solution for the care of your family pet is to re-home your pet with a trusted family member or family friend. Choose someone whom you know and trust and who knows how you care for your pet. Additionally, this person should, ideally, be

someone whom your pet already knows and gets along well with. To help with the financial burden of such items as food and veterinary care, some people consider leaving this caregiver a sum of money.

But what do you do when you do not have a family member or family friend who can take care of your pet? This is a question that many people have, and, fortunately, there are a number of organizations that can help.

These organizations, such as the Santa Barbara Humane Society, will take in your pet when you are no longer able to care for them and make sure your pet is placed in a home with a loving family. There is a cost to placing your pet with these organizations; often, they require an initial donation and enrollment in a planned giving program or a bequest at your passing in order to care for your pet before they are placed in a new home.

When both of the above options do not seem like a good fit for your pet or your situation, then a third option is available: the pet trust.

This is the most complex and most expensive method of planning for the care of your pet, but it allows you to have the most flexibility in terms of who will care for your pet and how they will care for your pet. There are a tremendous amount of decisions you need to make, if you elect to use a pet trust.



First and foremost, you need to select a trustee who will manage the assets of the pet trust and who may also be your pet's caregiver. You'll need to consider how and if this person will be compensated and who will succeed him in the event that he is unable to continue as trustee/

caregiver of your pet.

The second major consideration is how much money you should distribute to this trust; this involves considering the age and longevity of your pet, current and future veterinary expenses, and food and shelter costs. You also need to consider how you would like your pet cared for and directions that should be given to your pet's caregiver for grooming, activity, and basic well-being. Because every animal has a unique personality and unique guidelines for their care, creating a pet trust is a very customized process and, therefore, can be an expensive undertaking.

Ultimately, you need to know that there are a number of options available for the care of your family pet, ranging from simple and inexpensive to complex and costly. There is no right or wrong decision; there is just the decision that is right for you and your pet.

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