

Pet Trust Worksheet

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We'll use this completed worksheet along with a discussion with you to design a pet trust that meets your estate planning goals for your entire family – the furry and not furry ones too! If possible, please return the completed worksheet, along with a photo of your pet(s), to our office prior to your appointment.

Personal Information:

Tell us about yourself.

Name: _____

Address: _____

Home Phone: _____

Work Phone: _____

Cell Phone: _____

Email Address: _____

Pet Information:

Tell us about your pet(s), e.g. "Simon, cat."

1. _____
2. _____
3. _____
4. _____
5. _____

Caregiver:

Tell us about the person you want to take care of your pet(s).

Name: _____

Address: _____

Phone: _____

Email Address: _____

Relationship: _____

Alternate Caregiver:

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Name: _____

Address: _____

Phone: _____

Email Address: _____

Relationship: _____

Alternate Caregiver:

Name: _____

Address: _____

Phone: _____

Email Address: _____

Relationship: _____

Instructions for Routine Care:

Tell us about the daily care of your pet(s).

Instructions for Medical Treatment:

Tell us about the routine medical treatment of your pet(s).

Instructions for End of Life Care:

Tell us about the end of life care you would like for your pet(s).

Cost of Care:

	Monthly	Annually
Food		
Medication		
Grooming		
Veterinary Care		
Pet Health Insurance*		
Boarding/Pet Sitting		
Toys and Treats		
Compensation to Caregiver		
Total		

*If you have health insurance for your pet(s), please complete the section below and include a copy of your pet's insurance card:

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Company: _____

Premium: _____

Coverage: _____

What should happen with any leftover money?

Briefly describe what you would like to happen with any money that's left over after your pet passes away.
