Family Animal Estate Planning Intake Worksheet

Educational Resource for Attorneys

This worksheet is intended to assist attorneys in gathering information regarding a client's family animals as part of the estate planning process. It is provided for educational purposes only and does not constitute legal advice or create an attorney-client relationship.

Client Information

Client Name ____________________

Co-Client (if applicable) ____________________

Date ____________________

Attorney ____________________

Family Animal Information

Family Animal #1

Name ____________________

Species ____________________

Breed ____________________

Age / Date of Birth ____________________

Sex ____________________

Microchip Number ____________________

Color / Identifying Marks ____________________

Current Photograph Attached ☐ Yes ☐ No

Repeat this section for additional family animals as needed.

Current Ownership

Who currently owns the family animal?

☐ Client ☐ Joint Ownership ☐ Other

If Other, please specify ____________________

Current Living Arrangements

Primary Residence ____________________

Daily Caregiver ____________________

Other Household Members ____________________

Emergency Care

Primary Emergency Caregiver

Name

Relationship

Phone

Email

Address

Alternate Emergency Caregiver

Name

Relationship

Phone

Email

Address

Long-Term Guardian Preferences

Preferred Long-Term Guardian

Name

Relationship

Phone

Email

Address

Reason for Selection

Alternate Guardian

Care Instructions

Daily Routine

Diet

Medications

Exercise

Behavioral Considerations

Favorite Activities

Special Handling Instructions

Veterinary Information

Primary Veterinarian

Practice

Veterinarian

Phone

Email

Address

Emergency Veterinary Hospital

Medical History

Current Medical Conditions

Current Medications

Known Allergies

Insurance Information

Financial Planning

Estimated Annual Care Expenses

$ — Food

$ — Veterinary Care

$ — Insurance

$ — Medication

$ — Grooming

$ — Boarding / Daycare

$ — Other

Estimated Total Annual Cost

Estate Planning Coordination

Existing documents (indicate whether the client currently has each):

Last Will and Testament	☐ Yes ☐ No
Revocable Trust	☐ Yes ☐ No
Irrevocable Trust	☐ Yes ☐ No
Financial Power of Attorney	☐ Yes ☐ No
Health Care Documents	☐ Yes ☐ No
Family Animal Trust	☐ Yes ☐ No

Planning Objectives

The client wishes to:

- ☐ Ensure continued care after death
- ☐ Ensure care during incapacity
- ☐ Provide funding for future care
- ☐ Nominate a caregiver
- ☐ Nominate a trustee
- ☐ Avoid family disputes
- ☐ Maintain the current lifestyle for the family animal
- ☐ Other

If Other, please specify ____________________

Additional Notes

Attorney Follow-Up Checklist

- ☐ Review ownership issues
- ☐ Discuss applicable state law
- ☐ Review existing estate planning documents
- ☐ Discuss funding options
- ☐ Discuss caregiver selection
- ☐ Discuss trustee selection
- ☐ Discuss successor caregivers
- ☐ Discuss incapacity planning
- ☐ Determine whether a Family Animal Trust is appropriate
- ☐ Review coordination with the client's overall estate plan

Educational Disclaimer

This worksheet is an educational planning resource developed by PawsinTrust™ to facilitate discussions between attorneys and clients regarding family animal planning. It is not a legal form, does not constitute legal advice, and should not be relied upon as a substitute for independent legal judgment. Attorneys should adapt all planning recommendations and documents to the laws of the applicable jurisdiction and the specific circumstances of each client.

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