

# Legacy Care Plan Coordination Overview

## *Educational Resource for Attorneys*

This educational publication explains how the PawsinTrust™ Legacy Care Plan may complement traditional estate planning by organizing family animal information and supporting continuity-of-care planning. It is intended for educational purposes only and does not constitute legal advice.

## Purpose

Estate planning documents often address the distribution of property, fiduciary appointments, and incapacity planning. Clients who wish to provide for the continued care of their family animals may also benefit from maintaining organized care instructions and supporting information outside of their formal legal documents.

The PawsinTrust™ Legacy Care Plan is designed to complement—not replace—an attorney's estate planning documents by providing a centralized resource for family animal care information and continuity planning.

## The Legacy Care Plan Is Not a Substitute for Legal Documents

The PawsinTrust™ Legacy Care Plan is an educational planning resource.

### **The Legacy Care Plan is not:**

- A Last Will and Testament
- A Trust Agreement
- A Durable Financial Power of Attorney
- A Health Care Directive
- A legally enforceable family animal trust
- A substitute for legal advice

Clients should consult qualified legal counsel regarding the preparation of legally enforceable estate planning documents.

## How the Legacy Care Plan Supports Estate Planning

The Legacy Care Plan can assist by organizing information that attorneys and designated caregivers may find helpful during estate administration or periods of incapacity.

Topics may include:

- Family animal identification
- Veterinary information

- Daily care routines
- Medication schedules
- Emergency contacts
- Long-term care preferences
- Feeding instructions
- Behavioral considerations
- Preferred caregivers
- Estimated care expenses

## Coordination with a Last Will and Testament

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Attorneys may wish to discuss whether the client's Will should:

- Nominate individuals responsible for family animal care, where appropriate.
- Coordinate with separate trust provisions when applicable.
- Reference related planning documents where permitted by applicable law.
- Avoid inconsistent appointments or conflicting instructions.

The Legacy Care Plan may serve as an organized reference containing practical care information that is generally inappropriate for inclusion in a Will.

## Coordination with Trust Planning

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Where a trust is appropriate, attorneys may coordinate the Legacy Care Plan with:

- Revocable Trusts
- Irrevocable Trusts
- Family Animal Trusts authorized under applicable law

The Legacy Care Plan may provide practical care information while the trust governs the administration and distribution of trust assets.

## Coordination with Incapacity Planning

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Periods of incapacity often occur long before estate administration. Attorneys may discuss coordinating the Legacy Care Plan with:

- Durable Financial Powers of Attorney
- Temporary caregiver arrangements
- Hospitalization planning
- Assisted living transitions
- Health Care Directives
- Emergency Care Authorizations
- Long-term rehabilitation

Maintaining current care information may assist designated caregivers during these events.

## Coordination During Estate Administration

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During estate administration, organized family animal information may assist fiduciaries by identifying:

- Existing caregivers
- Medical needs
- Ongoing expenses
- Emergency contacts
- Veterinary providers
- Daily routines
- Insurance information
- Long-term care preferences

This information may help reduce delays and confusion while the estate is being administered.

## Periodic Review

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Clients should review and update their Legacy Care Plan whenever there is a significant change, including:

- Adoption of a new family animal
- Changes in veterinary providers
- Relocation
- Birth or adoption of children
- Updates to estate planning documents
- Death or replacement of a caregiver
- Medical changes
- Marriage or divorce
- Changes in financial circumstances

## Attorney Discussion Checklist

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- ☐ Review the client's existing estate plan.
- ☐ Identify all family animals.
- ☐ Confirm caregiver preferences.
- ☐ Review long-term care objectives.
- ☐ Discuss funding considerations.
- ☐ Coordinate appointments across planning documents.
- ☐ Review incapacity planning.
- ☐ Encourage periodic updates to care information.
- ☐ Confirm consistency among all planning documents.

## Key Takeaways

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The PawsinTrust™ Legacy Care Plan is intended to:

- Organize important family animal information.
- Support continuity-of-care planning.
- Facilitate communication among caregivers and fiduciaries.
- Complement professionally prepared estate planning documents.
- Encourage periodic review and updates.

The Legacy Care Plan is designed to work alongside an attorney's legal planning—not replace it.

## Educational Disclaimer

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This publication is provided by PawsinTrust™ solely for educational purposes. It is intended to assist attorneys in understanding how the PawsinTrust™ Legacy Care Plan may complement traditional estate planning. It is not legal advice, is not a legal document, and should not be relied upon as a substitute for independent legal judgment. Attorneys should evaluate all planning recommendations under the laws of the applicable jurisdiction and the specific circumstances of each client.