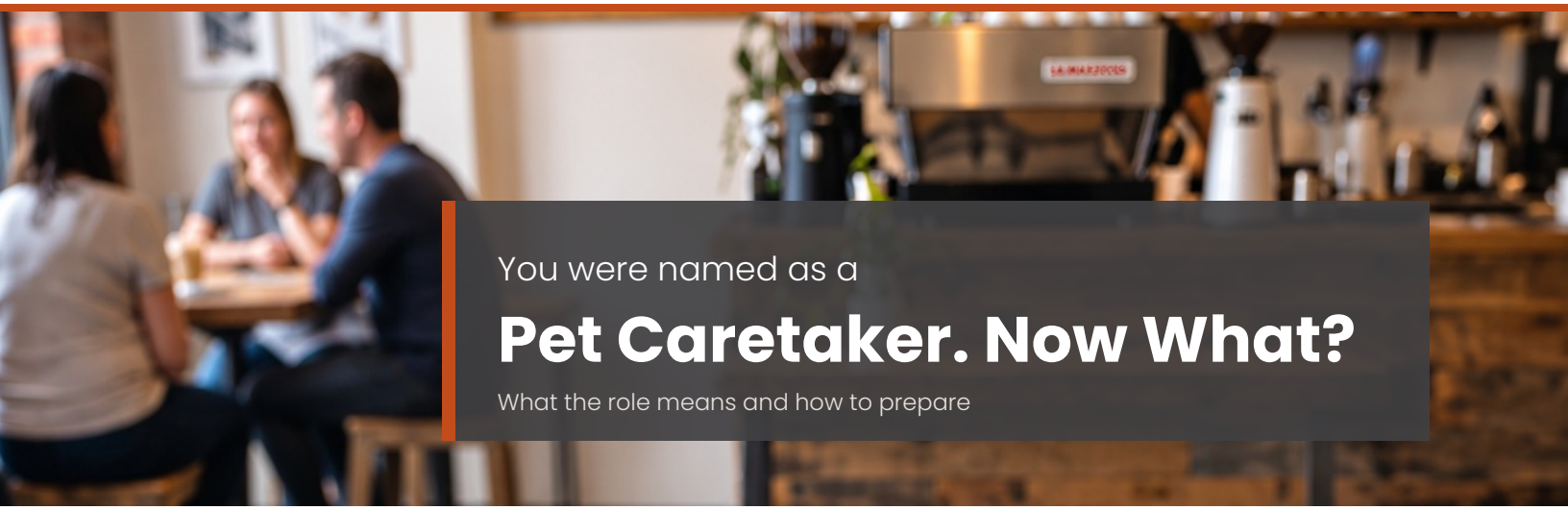


You were named as a

Pet Caretaker. Now What?

What the role means and how to prepare

Someone close to you has named you in their revocable living trust as caretaker for their pets. Being named is a meaningful expression of trust. It means someone looked carefully at the people in their life and chose you for a role that matters to them. It is also a responsibility worth understanding well before it is ever needed.

This guide explains what the role involves, the choices available to you, and a few practical steps you can take now so you are prepared if you are ever asked to serve.

> **If you were named as an alternate pet caretaker,** you would be asked to serve only if the first-choice pet caretaker is unable or unwilling to do so. The guidance below still applies, and a conversation with the family now is just as valuable.

How pets fit into a trust

Like a will, a revocable living trust provides instructions for how its creator, known as the grantor, wants property distributed after they pass away. Because the law treats pets as property, the trust can also say who should take custody of the grantor's pets and how they should be cared for. The grantor may also set aside money in a pet trust to pay for that care, and sometimes to compensate the caretaker.

What is a pet caretaker?

The pet caretaker is the person chosen to take custody of the grantor's pets after the grantor passes away or becomes unable to care for them. If you accept, you would provide a home for the pets and follow the grantor's care instructions. While every arrangement is different, pet caretakers typically:

- Provide a home for any pets entrusted to their care
- Follow the care instructions in the trust document, which may cover food, grooming, and the type of veterinary care the pets should receive

If a pet trust has been funded, you may be reimbursed for expenses related to the pets' care, so keep your receipts. Some pet trusts also provide periodic payments to the caretaker as compensation.

Do I have to serve as pet caretaker?

No. Being nominated does not obligate you to serve. If you decline when the time comes, an alternate named in the trust can be asked instead, and the trust document usually explains how a replacement is found. If you already know you would not want to serve, it is best to tell the grantor now so they can name someone else.

What should I do now?

- **Talk through care details,** including diet, medications, routines, and veterinarian contact information.
- **Understand the funding,** including whether a pet trust exists and who serves as its trustee.
- **Ask where the original trust document is kept** so you can locate it when needed.

Let's talk about your own plan

Helping families prepare for what comes next is at the heart of our work, and that includes every member of the family. Whether you would like to talk through this role or you are ready to put your own plan in order, we would be glad to help.

Call 541-228-9924 **Email** nate@nwadvisory.com
Schedule a conversation Book an introductory call

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