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# Planning for Your Animal Companions



Ocean Conservancy supporters like you often tell us that they consider their pets to be members of their families. Just as a will is one way to ensure that your human loved ones are provided for, it's important to make sure that the care and comfort of your dependent pets continues if you are unable to provide it yourself.



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Thinking about what would happen to your pets if something happened to you is part of being a responsible pet parent. Including pets in your will can help you ensure that they receive the care and comfort they need for the rest of their lives—and provide you with peace of mind.

### **1) Short-Term Care: Have an Emergency Plan**

Arrange for someone to come to your home on short notice in the event you are hospitalized or are unexpectedly prevented from returning home. Many people select a family member or trusted neighbor with whom their animals are comfortable.

### **2) Long-Term Permanent Care: Finding Guardians You Trust**

For many people, selecting permanent guardians for their animal companions is the most difficult aspect of estate planning. Choose people you trust to carry out your wishes, and with whom your animal companions are comfortable. It is a good idea to name at least two candidates for each animal in the event your first choice is unavailable. Also, consider ways to ensure that bonded animals are placed together.

### **3) Vital Information**

It is important to maintain files with current information about your animals and the arrangements you have made for their care. This information should be provided to temporary caregivers, permanent guardians and your estate planning attorney.

### **4) Special Considerations**

- **Animals with Commercial Value:** Horses, cattle, sheep and other animals retain commercial value after their deaths, increasing the likelihood that unprincipled people will try to acquire or harm them for personal gain. Be sure to stipulate in your estate plans that your animals should never be used commercially or sold for commercial use.
- **Long Life Expectancies:** For animals with long life expectancies, such as turtles, horses or exotic birds, choose their guardians with special care.



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- Sanctuaries: Some animals, such as pigs, sheep or cows may be happiest in a sanctuary with members of their own species. Reputable sanctuaries may be hard to find, so you should visit any sanctuary you are considering.
- Difficult Choices: In some situations, particularly where your animal friend is very old, in poor health or very dependent on you, euthanasia may be more humane than subjecting him or her to the distress of dislocation.

## 5) Formalize Your Plans

Consult with your attorney to incorporate your plans for your animal companions into your will or trust. There are a number of options available, including bequeathing animals directly to their permanent guardians along with funds for their care, or creating an enforceable trust that takes effect upon your death or in the event that you become incapacitated. In the case of an enforceable trust, you may also choose a final beneficiary like Ocean Conservancy to receive any remaining trust funds after your animal friend's lifetime.



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The path to ensuring that the quality of life of your animal companions is maintained is filled with difficult choices. Now is the time to make plans to protect your animals and ensure their care for their lifetimes.

## Ensuring Your Wishes

As you make plans to ensure care for your pets, it's also a good time to make sure that your will, trust and beneficiary forms are up to date. When you create or update your plans, we hope you will consider joining the many people who have decided to leave a gift to Ocean Conservancy as part of their ocean legacies.



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You are in no way obligated to do so, but if you have already made a gift to Ocean Conservancy in your will, trust or by beneficiary designation, we hope you will let us know, so we can thank you for your generosity and welcome you to the Ocean Legacy Society.

If you're looking for an opportunity to expand the impact you've made on the world through a gift in your will or trust, or through an IRA or other beneficiary designation, supporting Ocean Conservancy helps ensure a clean ocean and a healthy planet for future generations.

Our team of gift planning experts welcomes the opportunity to help you explore your goals and wishes as you create your own legacy for the ocean.





Download our other complimentary planning publications at  
[legacy.oceanconservancy.org/resources](https://legacy.oceanconservancy.org/resources)

## To leave a gift to Ocean Conservancy, we recommend you use this language:

*Ocean Conservancy, Tax ID 23-7245152, with its principal office in Washington, DC.*

## We Are Here to Help

We welcome the opportunity to assist you as you consider a future gift to Ocean Conservancy. We understand that leaving Ocean Conservancy a gift in your will or trust or by naming us one of your beneficiaries takes careful consideration. Contact us about creating your ocean legacy.

If you have already left a gift for Ocean Conservancy, we hope you will let us know. We would like to thank you and welcome you to the Ocean Legacy Society, our way of recognizing the exceptional individuals who have made protecting the ocean a part of their lasting legacy.



Yvonne Lee



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### Ocean Conservancy Planned Giving Team

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*This information is not intended as legal, accounting or other professional advice. For assistance in charitable planning, consult an attorney for legal advice or obtain services of a qualified professional.*

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