

# Address your pet in your estate plan using a pet trust

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If you're an animal lover like I am, a pet is a member of the family — sometimes even more so than flesh-and-blood. That's what my cat Scooter is to me. So you want to ensure that your beloved pet is cared for after you're gone. One way to do so is to make provisions for your pet through a trust. (Note: I've created one under my Will for Scooter if I predecease him.)

This legally sanctioned arrangement allows you to set aside funds for the animal's care. After the pet dies, any remaining funds are distributed among your heirs as directed by the trust's terms.

## **Pet trust in action**

The basic guidelines are comparable to trusts for people. You, as the grantor, create the trust to take effect either during your lifetime or at death. Typically, a trustee will hold property for the benefit of your pet. Payments to a designated caregiver are made on a regular basis.

Depending on the state in which the trust is established, it terminates upon the death of the pet or after 21 years, whichever occurs first. Some states allow a pet trust to continue past the 21-year term if the animal remains alive. This can be beneficial for pets that have longer life expectancies than cats and dogs, such as parrots and turtles.

## **Include specific instructions**

Because you know your pet better than anyone else, you may provide specific instructions for his or her care and maintenance (for example, a specific veterinarian or brand of food). The trust can also mandate periodic visits to the vet and other obligations should you become unable to care for the pet yourself. If you have questions on how to address your pet in your estate plan, please contact us.

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