

Pet Trust

How To Checklist

A Pet Trust is an easy way to ensure that your pet will have a permanent caregiver, and to provide the financial resources to care for your pet if they were to outlive you. You can also assign a Trustee and Protector to ensure your wishes are followed. This ensures that your pet will be protected and won't be sent to a shelter if you pass away before they do. We understand that planning your estate and creating your Pet Trust can seem like a difficult process, but with Gentreo it is easy and affordable.

To help guide you through the process even further, we have provided you with a step-by-step guide to help assist you through everything.

Before You Start:

1. Gather contact information for your pet's Guardian, Trustee & Protector
2. Decide what money or assets you want to set aside for your pet's care



Name the Trust & Add Basic Info About Your Pet

To begin creating your Pet Trust, you will need to give the Trust a name. Once you have done this, you can start adding basic information about your pet, including their name, breed, microchip number, veterinarian, and contact information for their veterinarian. You can also clarify if you already have a Pet Information Sheet available in your Gentreo Digital Family Vault, which can be referenced if more information is needed.



Select Your Caregivers

If you should happen to pass away before your pet, you want to ensure that you have the proper caretakers in place to ensure your pet is always safe. Here you can add a permanent caregiver, as well as their contact information to have ready and available for your Trustee if your pet was ever in need. You can also designate if you would like your Trustee to pay the caregiver for their work, and if so, how much you would like them to receive.



State Your Choices for Disposition of Pet Remains

You have the option to provide your caretaker or trustee with the authority to give your pet humane euthanasia. If you had passed away and something terrible were to happen which left your pet in need of euthanasia, giving this authority allows your caretaker to take necessary action in regards to your pet's health. This can prevent any suffering if your pet was in critical condition. We understand that this is a hard authority to give, which is why it is important that you and your caretaker communicate to determine what you feel is best for your pet. You also have the option to specify how you would like your pet's remains to be cremated or buried in the event that they passed.



Name Trustees

The Trustee that you select to manage your Pet Trust would have the responsibility of designating how funds are dispersed to your pet's caregiver. Typically you would name yourself as the primary trustee to ensure that you have control over your Pet Trust until you pass away. Then, your second or third choice would inherit the responsibility. Regardless of who you select as your Trustee, it should be someone you trust to manage your designated finances and ensure that your pet receives the care that they need when you can no longer be there for them.

Name a Protector for the Trust (optional, but recommended)

A protector is a person that you designate in your Pet Trust to oversee the Trustee and Caregivers to ensure that your pet is receiving the care that they need, as well as ensure that the money designated for your pet is being used appropriately. They have the authority to oversee the whole process, and can even take your Trustee and caregivers to court if they find that they are not abiding by the terms of the Pet Trust. You can add up to three options for a protector in case your first choice is unable to serve.

State Your Choices for How Remaining Trust Assets Would Be Distributed

If your pet were to pass away before all of the funds in your Pet Trust were exhausted, you can designate who inherits the remainder of the money in that Trust. This can be set up to be given to an individual or divided amongst a class, like your children or grandchildren. You have the option to set up a first, second, and third choice beneficiary for these funds, in case your first option is unable to receive them. It is important that all of their contact information is up to date to ensure that your funds are not lost or given to someone you would not have wanted.

Make Your Pet Trust Official

1. Print your documents. Upon completion of filling out your information for your Pet Trust, your documents need to be printed out and, if required in your state, taken to a notary.

2. Get your Pet Trust Notarized. In some states, your Pet Trust needs to be signed in front of a witness and/or notary in order for it to be accepted and legally binding. This can be done in a variety of ways, though it is important to check which criteria are required by your state. For example, some states allow remote online notarization, however the majority of states do not.

[Click Here](#) to learn about remote online notarization laws in each state.

3. Upload the completed documents to your Gentreo Digital Family Vault. Upload your signed Pet Trust to the Gentreo Digital Family Vault so that you can access, edit, and share your document any time. With the Gentreo Digital Family Vault, everyone knows where to turn in the event of an emergency and instant access is always just a few clicks away.

4. Share documents with your loved ones. By providing your loved ones with access to your Pet Trust through your Gentreo Digital Family Vault, you ensure that they have instant access in the event of an emergency. You wouldn't want to put your pet at risk because your family cannot access the necessary documentation.

5. Update your documents as needed, when life circumstances change, live events happen, or laws in your state change. Gentreo is with you every step of the way.

Congratulations, you have completed your Pet Trust!