

Amy Shever
Director, 2nd Chance 4 Pets

PSI WEBINAR:

**Helping Pet Owners Plan for the
Possibility that Their Pets Might
Outlive Them**



Agenda

- **Background about the issue of pets outliving their pet owners**
- **Emergency planning**
- **Lifetime care planning**
- **What to do if you have to rehome a client's pets**
- **Resources available for pet owners and pet sitters**



Three Questions- Question #1

Who will care for **your** pets should anything happen to you?



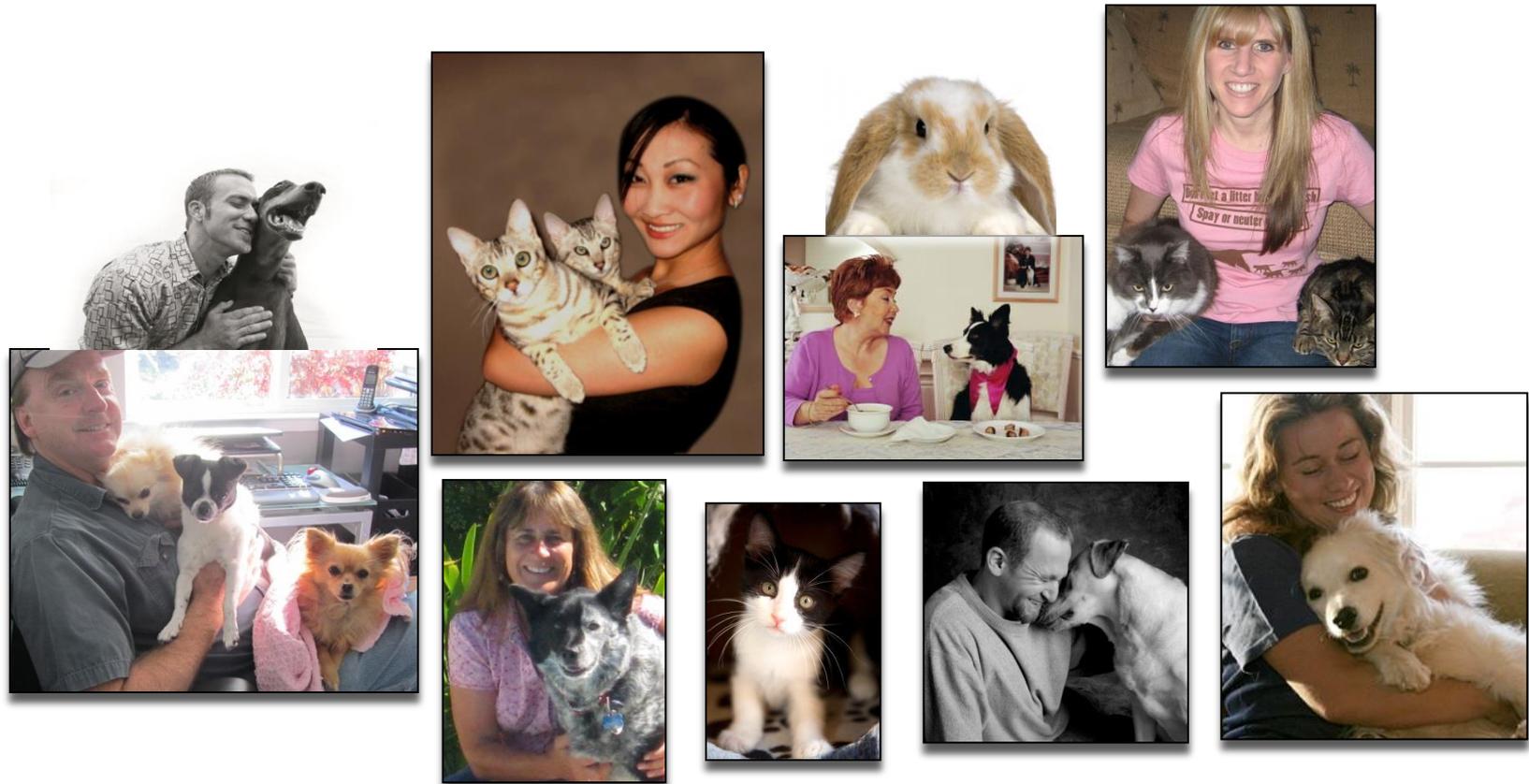
Three Questions- Question #2

Who will care for your **relatives'** and **friends'** pets should anything happen to them?



Three Questions- Question #3

Who will care for your **clients'** pets should anything happen to them?



About 2nd Chance 4 Pets

- **2nd Chance 4 Pets is an all-virtual volunteer, 501(c)3 nonprofit organization established in 2003 to reduce the number of pets relinquished and euthanized due to death or disability of their human companions. We have no paid staff.**
- **We are an advocacy group, not a rescue group.**
- **We are not lawyers, but we have estate planners that serve on our advisory board.**



Orphaned Pets

When orphaned animals are relinquished to animal shelters, they are often “labeled” **unadoptable** due to their refusal to eat and their being despondent.



Meet Sophie

- **3 years old, extremely shy, greeted her human companion by the door every evening.**
- **On September 11th 2001, Sophie's human companion didn't come home.**
- **Like 800 other pets in New York City that day, Sophie became an orphaned pet. Her human was only 32 years old.**
- **It took rescuers 2 weeks to find Sophie home, alone.**



Meet Lucy

- **“I was 30 years young when my human died (I hope to live to at least 75!). I spent many lonely months in a relative’s basement where I was given food but received very little companionship.**
- **“I was eventually taken to a bird sanctuary where I am now surrounded by feathered friends who had been orphaned just like me.”**
- **Check out our newsletter on our website (archives) focused entirely on “lifetime care planning” for birds.**



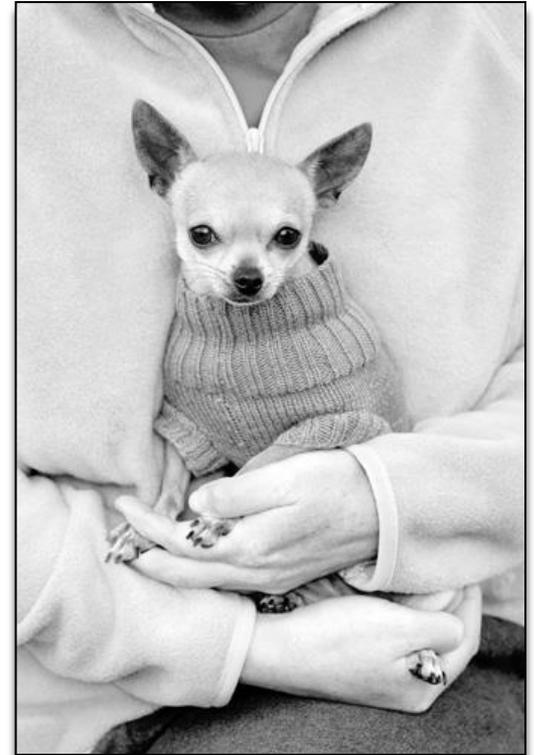
Ken's Kids

Buffy and Willy



The Facts

- **Between 3.5 and 4 million pets are relinquished and euthanized in U.S. shelters each year. It is estimated that more than 500,000 of these pets are surrendered due to the pets outliving their humans.**
- **While spay and neuter programs have reduced the number of pets ending up in shelters, there previously was no formal strategy addressing pets being relinquished due to the death of their human companions.**
- **\$2 billion = the annual cost of capturing, caring for, and euthanizing dogs and cats in shelters.**



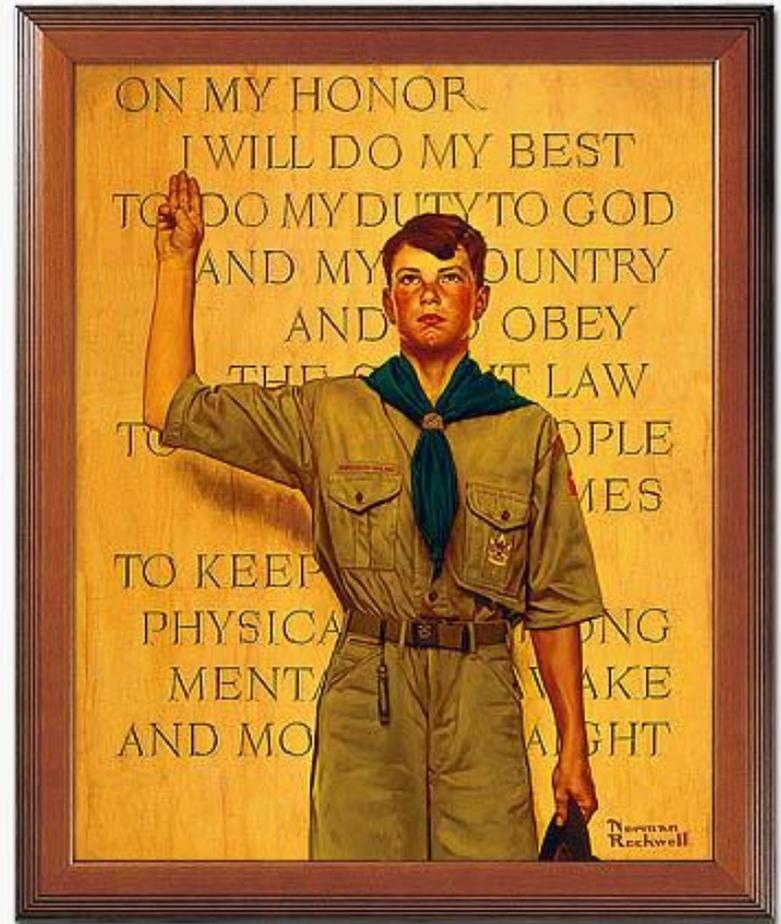
Emergency Planning

In the confusion that accompanies a person's unexpected illness, accident, or death, **pets may be overlooked**. To prevent this from happening, we encourage responsible pet owners to :

- Identify at least **two responsible friends or relatives** who agree to provide temporary care if needed. Give them keys to your home, feeding and care instructions, the name of your veterinarian, and information about any permanent care provisions you have made.
- Make sure neighbors, friends, and relatives know how many pets you have, and provide them with contact information for emergency caregivers.
- Carry an **"emergency identification card"** that lists the names and phone numbers of emergency caregivers. Post **"in case of emergency"** notices on your doors or windows, specifying how many and what types of pets you have (emergency cards can be downloaded from the 2nd Chance 4 Pets website).

Other Considerations: Emergency Planning

- **Emergency Kit for Your Pets**
- **Accommodations Outside of Your Area**
- **Pet Identification: Microchip AND Tags**
- **Proof of Vaccinations, Up-to-Date Records**
- **Photos , Ownership/Adoption Certificates**
- **Emergency ID Cards**



Emergency Checklist

- ✓ **Harnesses, carriers, crates, and cages.** Harnesses are better than collars for safety and security. Each pet should have its own crate, cage, or carrier. Be sure to include comfortable bedding, such as old blankets, and any toys to help your pet feel more secure.
- ✓ **ID, contact information, and medical records.** All pets should have ID tags with emergency-contact information in case you become separated. Write the same information in indelible marker on the pet carrier. Include feeding and medical information, description of any pertinent behavioral issues. Keep a copy of records and identification photos of your pet with you at all times. (Keep paperwork safe from birds!)
- ✓ **Food, water, and medicine.** Pack three to seven days worth of nonperishable food and water as well as a week's supply of any necessary medicine, separate bowls for food and water.
- ✓ **Sanitation.** Pack paper towels, liquid dish soap, a small bottle of household bleach, and a package of garbage bags.

Lifetime Care Options

Three Basic Components:

- **Caregivers:** identify people who are **committed** to caring for your pets temporarily in an emergency situation- **or permanently**
- **Written instructions:** include all special care requirements, diet, exercise, daily routine, location of food and medicine (care instructions workbook can be downloaded from our website)
- **Financing:** Set aside funds to ensure that your pets receive continuous care



Find a Committed Caregiver (or 2!)

- **Pet Sitters**
- **Other pet owners (like those you meet on your walks and at the dog park)**
- **Vet technicians, vet students**
- **Check with friends, relatives, neighbors**
- **Talk to your designated caregiver (s) every few years-
Do you want a complete stranger making decisions
about your pets' future?**



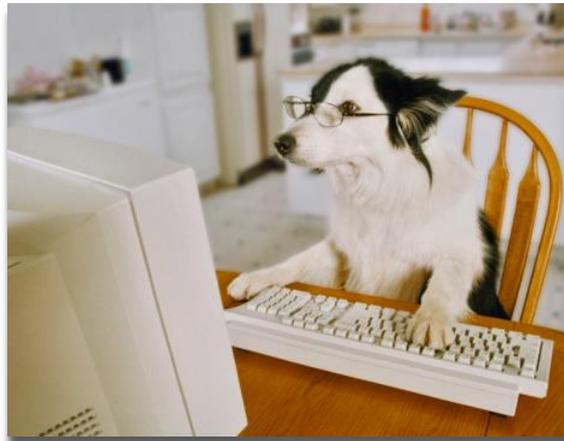
Written Instructions

- **Caregivers need copies**
- **People must know *where* to find them**
- **Keep instructions updated with current information about food and medication**
- **Download our free *pet care instructions workbook* from our website**



Financial Planning: setting aside a fund to cover expenses

- **Life insurance policy- named to a human beneficiary**
- **Discuss with financial planner or attorney**
- **Justify amount: life expectancy of pet, how much is spent every year (consider emergencies, pet insurance, increase costs for aging pets)**



Lifetime Care Options- options for planning our pets' future care

- **Wills and estate plans (when in doubt, create a trust!)**
- **Pet trusts created by attorneys: 46 states have pet trust laws**
- **“Animal Care Panel”**: a great option for pet owners with no caregivers and no beneficiaries and for pet owners with special needs pets and those with a large number of pets
- **Perpetual Care Programs and Small Sanctuaries**



Wills and Estate Plans

- **Generally considered to be costly (to create and to update)**
- **A few lines about the pets added to an estate plan or will may not be sufficient**
- **Attorneys may not be up-to-speed about pet requirements to include in a trust**
- **A small % of Americans will create a trust. Those that do may not update them as often as they should. **In order for a trust to be kept current, it must be updated every few years****



Pet Trusts

- **46 states have statutes in place**
- **Few lawyers specialize in pet trusts**
- **Pet owners should consider using a pet trust as a supplement to an existing estate plan**



Animal Care Panel

- A good option for pet owners who **own their home**, their beneficiaries will not contest
- A good option for pet owners with no caregivers
- A good option for pet owners with a large number of pets, who have pets with special needs, who want their pets to remain together in their home



Perpetual Care Programs

Most programs are currently run by veterinarian schools.

Pros:

- **Guarantee that pets will be cared for**
- **Can be a good option for birds and horses with long life expectancies**

Cons:

- **Costly; \$25k - \$200k per pet**
- **Facility may not be ideal environment for new pets**
- **New programs, risk of sustainability**

Purdue School of Veterinary Medicine, Peace of Mind Program, West Lafayette, IN

Kansas State Univ. College of Veterinary Medicine Perpetual Pet Care Program, Manhattan, KS

Texas A&M University The Stevenson Companion Animal Life-Care Center College Station, Texas

UC Davis School of Veterinary Medicine, The Tender Loving Care for Pets Program, Davis, CA (*not accepting new clients*)

Small Animal Sanctuaries

- **Hundreds exist (check the resources section on our website: www.2ndchance4pets.org)**
- **No formal process to inspect, evaluate, accredit.**
- **Many are created by animal lovers with the best intentions.**
- **Many are not financially sustainable; founders typically do not have succession plans**
- **2nd Chance 4 Pets will be launching a sanctuary referral program in 2014 working with some of the best sanctuaries.**
- **Pet owners need to thoroughly evaluate this option!**



Evaluating a Perpetual Care Program or Animal Sanctuary

- **How long has the program existed? How is the program funded?**
- **Is the program appropriately licensed?**
- **What happens to the pets if the program is unable to continue?**
- **What is the relative experience and training of the employees and owners?**
- **What is the pet to person ratio?**
- **How much does each pet receive on a daily basis?**
- **What is the financial commitment required for each pet?**
- **How much has to be paid in advance?**
- **What is their capacity for pets?**
- **What are the physical conditions of the facility?**
- **What type of space do the pets have (e.g., are they kept in cages)?**
- **Are there references with whom you may contact?**
- **Are pets adopted out or do they remain at the facility permanently?**
- **What does their adoption process entail?**
- **How do they follow up with adoptions?**

Evaluating a Perpetual Care Program or Animal Sanctuary (continued)

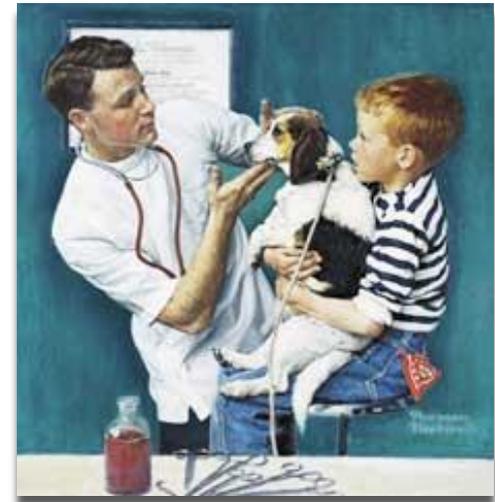
- **What is the program's policy about returning pets?**
- **What level of veterinary care is provided?**
- **Is veterinary care administered by licensed veterinarians or by interns?**
- **Do pets receive regular examinations?**
- **How are medical emergencies handled?**
- **What is their position on euthanasia? (You might consider meeting the veterinarians that support the program.)**
- **What type of food do they feed their pets?**
- **When are the pets fed?**
- **Will they accommodate special diets?**
- **What type of exercise routine is typical for the pets in their care?**
- **Does the program accept pets regardless of age and medical needs?**
- **Will they honor special burial requests?**

What are the opportunities to make a difference?

- **Lifetime Care Options:** making sure that in the event of an emergency, our pets will be taken care of
- We encourage pet owners to support **all-volunteer shelter and rescue groups**. Very little support is provided to these organizations. More than **12,500** groups exist. Most groups are made up entirely of volunteers.
- Encourage adoptions from shelters and rescue groups: only **20%** of companion animals in homes come from shelters. Adoptable animals by breed and location are easily found at **www.petfinder.com**.
- Spay and neuter programs: plenty of low cost programs exist **www.asPCA.org/pet-care/spayneuter**

For Veterinarians

- Vet clinics should include on their client's intake form, **“Who should we contact in case of an emergency?”**, **“If any should happen to you and you no longer could care for your pets, who will care for them?”**
- Vet clinics will distribute emergency ID cards and brochures to their clients.
- Vet clinics will discuss the **“three components”** of a lifetime care plan with their clients.



Making an Impact in Your Community

- Hold educational **workshops**; partner with vet clinics, pet day care centers, local rescue groups, civic groups, The Red Cross and senior centers.
- Leverage workshops to match homeless pets with new families, promote your business and identify **new clients**
- 2nd Chance 4 Pets can provide slideware and printed materials for your workshops at for the cost of shipping.



Health Benefits of Companion Animals

Scientific research indicates that including a pet as part of your family brings significant health benefits, especially for those of us over 65 years of age. Here are a few results from these studies:

- **The simple act of holding an animal can relieve symptoms of depression, lower blood pressure, and even decrease surgical patients' healing times.**
- **The long-term survival rates of heart attack victims who had a pet are proven to be significantly longer than those who did not.**
- **Widows who have cats are better off medically during the first year as a widow, which is a critical time for stress, than widows who do not.**

Providing Programs for Seniors

Pet Peace of Mind, www.Banfield.com

- **Funded by Banfield Charitable Trust .**
- **Works with hospices to implement programs to allow hospice patients to keep their pets with them throughout their end of life journey.**
- **Services range from dog walking and litter cleaning to transport for vet and grooming appointments, delivery of pet food, and assistance with planning for the pets' home relocation after the patient passes.**
- **This program is at the core of the trust's mission of finding innovative ways to keep pets and families together.**

Providing Programs for Seniors

Rebecca's Rainbow, www.rebeccarainbow.org

- **A 501(c)3 which started in 2009 to provide a resource for terminally or critically ill pet owners in the state of Washington to find safe placement for their beloved pets.**
- **Provides temporary housing for pets and address their veterinary needs.**
- **Works closely with social workers, health care workers, real estate agents, funeral directors, attorneys, veterinary professionals, and animal shelter personnel to keep these pets from being surrendered to shelters and/or unnecessarily euthanized.**
- **When possible, program staff meet with each person and his/her family to understand their requests about the kind of home that would be best if it becomes necessary to rehome pets.**
- **The assurance that these pets will be cared for lifts a tremendous burden and helps provide peace of mind.**

Homeless Pet Flyers



Callie

Callie is a quiet natured cat who likes to sleep in bed with you and watch TV. She likes to play with dogs and thinks she is the family princess! She is looking for a warm and cozy home and a lap to curl up in. Come see her today at the Santa Ynez Valley Humane Society.

Callie was originally adopted from us at six weeks old, a domestic long-hair, Calico, (spayed), and now seven years old, her owners recently got a new kitten. They felt Callie was not as happy after a week with the new kitten and turned Callie in to us! She is an awesome cat, shy at first as she has lived as a lap cat in the house her whole life and now is back here. She is a great cat that loves to just sit and be petted.

FOR MORE INFORMATION:
 Contact us at www.SYV.org
 Email is Humane@SYV.org
 We are open Monday thru Saturday 10:00am-4:00pm & Sunday 1:00-4:00pm.



Peebo Needs a Home

Peebo really, really, really needs a home. Sometimes she acts like she's scared of her own shadow, but once she's found she can trust you she'll make "muffins" kneading away for your attention. Peebo wants to be an indoor kitty so she doesn't have to worry so much about the big, scary world out there.

Peebo is a domestic short-hair black and white bicolor kitty. She is 3 years old and spayed.

Peebo came to us as kitten and was recently adopted a few weeks ago, but she was returned. Peebo is very shy and needs to have a quiet home where she feels safe. Peebo is a great cat and she definitely needs someone who will love her for her shyness and help her feel safe. If you are familiar with the Meet your Match program, she scored as a private investigator.

FOR MORE INFORMATION:
 Contact us at www.SYVHumane.org or www.Petfinder.com
 Email is Humane@SYV.com and our phone is (805)688-8224
 We are open Monday thru Saturday 10:00am-4:00pm & Sunday 1:00-4:00pm.



June Bug's Story

June Bug, came to us after her owner passed away of Alzheimer's. She was used as a therapy cat for this woman. She has the remains of "Soft Paws" on still and is used to wearing them.

June Bug is the kind of kitty you just want to snuggle when you see her. She has lived with an older family and is very gentle. She likes the company of her cat friends, but she is also happy with her quiet time. Her beautiful, long, soft, fur will make you want to spend hours petting her, she loves to be brushed and purrs at the thought of a lazy afternoon in the sun being brushed. She is a female, spayed, persian tabby mix and 13 years old. Come see June Bug today!

FOR MORE INFORMATION:
 Contact us at www.SYVHumane.org or www.Petfinder.com
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Rehoming a Pet

- **Enlist the help of your local rescue groups- meet them in person, do not rely on email or phone. Rescue groups can properly screen and conduct home checks.**
- **Rescue groups may have foster homes available where the pets can stay until they are adopted (donation to the rescue group can't hurt!)**
- **NEVER post pets to Craigslist**
- **Make sure the pets are (1) microchipped , (2) spayed/neutered , (2) up to date with all shots**
- **Provide all care instructions for the adopters**
- **Facebook is the #1 method to network pets who need homes. Rescue groups can post the pets to Petfinder.**



How your business can make a difference...

- Please distribute our **materials**, include our articles in your newsletters and on your website.
- Educate your clients! At a minimum, **make sure your clients have one committed caregiver.**
- Participate with us at animal welfare and veterinarian conferences. In 2014 our volunteers will participate at these conferences:
 - February 16-20: Western Veterinary Conference (WVC), Las Vegas
 - March 20-23: American Animal Hospital Association (AAHA), Nashville
 - May 20-23: Humane Society of the United States (HSUS) Animal Care Expo, Daytona Beach
 - June 4-7, 2014: American College of Veterinary Internal Medicine (ACVIM), Nashville
 - October 30-Nov 2 2014: American Board of Veterinary Practitioners, Nashville, TN (ABVP), Nashville



Resources

- **“Resources” tab on our website www.2ndchance4pets.org**
- **Presentation template that can be customized- on the resources section of our website**
- **Articles, emergency ID cards, **pet care instructions “workbook”****
- **“Door Hangers” now available!**
- **Sliderocket presentation-great resource to share**



Peggy Hoyt

- **Estate planner in Florida**
- **One of a few U.S. attorneys who specializes in pet trusts, animal care panels**
- **Author, *All My Children Wear Fur Coats***
- **2nd Chance 4 Pets' volunteer and advisory board member**
- **Daughter of John Hoyt, past HSUS President**
- **Web: www.legacyforyourpet.com**



Gerry Buyer

- **Gerry Buyer, Professor of Law Texas Tech University School of Law**
- **2nd Chance 4 Pets' advisory board member**
- **Check out Gerry's comprehensive website with information about pet trusts**
- **Email- gwb@professorbuyer.com**
- **Web- www.professorbuyer.com**



Choosing a Permanent Caregiver

- **Decide whether you want all your pets to go to one person, or whether different pets should go to different people.**
- **If possible, keep pets who have bonded with one another together.**
- **When selecting caregivers, consider partners, adult children, parents, brothers, sisters, and friends who have met your pet and have successfully cared for pets themselves.**
- **Also, name alternate caregivers in case your first choice becomes unable or unwilling to take your pet.**
- **Be sure to discuss your expectations with potential caregivers so they understand the large responsibility of caring for your pet.**
- **Remember, the new owner will have full discretion over the animal's care—including veterinary treatment and euthanasia—so make sure you choose a person you trust implicitly and who will do what is in the best interest of your pet.**
- **Stay in touch with the designated caregivers and alternates.**

Choosing a Permanent Caregiver (continued)

- **Over time, people's circumstances and priorities change, and you want to make sure that the arrangements you have made continue to hold from the designated caregivers' vantage points.**
- **If all else fails, it is also possible to direct your executor or personal representative, in your will, to place the animal with another individual or family (that is, in a non-institutionalized setting).**
- **Finding a satisfactory new home can take several weeks of searching, so again, it is important to line up temporary care.**
- **You also have to know and trust your executor and provide useful, but not unrealistically confining, instructions in your will.**
- **You should also authorize your executor to expend funds from your estate for the temporary care of your pet as well as for the costs of looking for a new home and transporting the animal to it.**
- **The will should also grant broad discretion to your executor in making decisions about the animal and in expending estate funds on the animal's behalf.**

Entrusting a Pet to an Organization

- **Most humane organizations do not have the space or funds to care for your pet indefinitely and cannot guarantee that someone will adopt your animal.**
- **Although, some may be able to board and care for your pet temporarily until he can be transferred to his designated caregiver.**
- **There are, however, a few organizations that specialize in long-term care of pets of deceased owners.**
- **For a fee or donation, these "pet retirement homes" or "sanctuaries" may agree to find your pet a new home or care for your pet until she dies.**
- **Be aware, however, that pets are companion animals who need lots of care and affection; they may suffer from long-term confinement in such facilities.**
- **Your pet will not want to be institutionalized any more than you would want to be.**
- **Before making any formal arrangements, visit the organization to see how animals are cared for, where they are confined, who looks after them, when they are socialized and exercised, and what policies and procedures exist regarding care at the facility and placement with a new family.**

Sample Language for a Will

(From hsus.org) Here is some sample language that you can use in your will to provide your executor with guidance in arranging for your pet's care:

{Article Number} A. As a matter of high priority and importance, I direct my Personal Representative to place any and all animals I may own at the time of my death with another individual or family (that is, in a private, non-institutionalized setting) where such animals will be cared for in a manner that any responsible, devoted pet owner would afford to his or her pets. Prior to initiating such efforts to place my animals, I direct my Personal Representative to consult _____, D.V.M. (currently at the _____ Hospital), or, in the event of Dr. _____'s unavailability, a veterinarian chosen by my Personal Representative, to ensure that each animal is in generally good health and is not suffering physically. In addition, I direct my Personal Representative to provide any needed, reasonable veterinary care that my animal(s) may need at that time to restore the animal(s) to generally good health and to alleviate suffering, if possible. Any animal(s) not in generally good health or who is so suffering—and whose care is beyond the capabilities of veterinary medicine, reasonably employed, to restore to generally good health or to alleviate suffering—shall be euthanized, cremated, and the ashes disposed of at the discretion of my Personal Representative. Any expenses incurred for the care (including the costs of veterinary services), placement, or transportation of my animals, or to otherwise effect the purposes of this Article _____ up to the time of placement, shall be charged against the principal of my residuary estate. Decisions my Personal Representative makes under this Article _____—for example, with respect to the veterinary care to be afforded to my animal(s) and the costs of such care—shall be final. My intention is that my Personal Representative have the broadest possible discretion to carry out the purposes of this paragraph.

Limitations of a Will

(From hsus.org) Although your lawyer will help you decide what type of document best suits your needs, you should be aware of some drawbacks to wills.

- For example, a will takes effect only upon your death, and it will not be probated and formally recognized by a court for days or even weeks.
- What's more, if legal disputes arise, the final settlement of your property may be prolonged.
- Even determining the rightful new owner of your pet can get delayed.

Which is the Better Option: a Will or a Trust?

- **There are many types of wills and trusts; determining which is best for you and your pet depends on your situation and needs.**
- **It's important to seek the advice of an attorney who both understands your desire to provide for your pet and can help you create a will and/or trust that best provides for him.**
- **You and your attorney also need to make sure that a trust for the benefit of one or more specific animals is valid and enforceable in your state.**
- **Even if your state law recognizes the validity of such trusts, keep in mind that tying up a substantial amount of money or property in a trust for an animal's benefit may prove to be controversial from the point of view of a relative or other heir.**
- **Moreover, trusts are legal entities that are relatively expensive to administer and maintain, all of which underscores the need for careful planning and legal advice.**
- **After you and your lawyer create a will, a trust, or both, leave copies with the person you've chosen to be executor of your estate as well as with the pet's designated caregiver so that he or she can look after your pet immediately.**
- **(The executor and caregiver may or may not be the same person.)**
- **Make sure the caregiver also has copies of your pet's veterinary records and information about her behavior traits and dietary preferences.**

Setting Up a Trust

Unlike a will, a trust can provide for your pet immediately and can apply not only if you die, but also if you become ill or incapacitated.

- **That's because you determine when your trust becomes effective.**
- **When you create a trust for your pet, you set aside money to be used for his care and you specify a trustee to control the funds.**
- **A trust created separately from your will carries certain benefits.**
- **The trust can be written to exclude certain assets from the probate process so that funds are more readily available to care for your pet.**
- **Additionally, it can be structured to provide for your pet even during a lengthy disability.**

Powers of Attorney

- **Powers of attorney, which authorize someone else to conduct some or all of your affairs for you while you are alive, have become a standard planning device.**
- **Such documents can be written to take effect upon your physical or mental incapacity and to continue in effect after you become incapacitated.**
- **They are simpler than trusts and do not create a legal entity that needs to be maintained by formal means.**
- **Provisions can be inserted in powers of attorney authorizing your attorney-in-fact—the person designated to handle your affairs—to take care of your pets, expend money to do so, and even to place your pets with permanent caregivers if appropriate.**
- **Like any other legal device, however, powers of attorney are documents that by themselves cannot ensure that your pet is fed, walked, medicated, or otherwise cared for daily.**
- **Legal devices can only complement your personal efforts in thinking ahead and finding temporary and permanent caregivers who can take over your pet's care immediately when the need arises.**
- **It is critical to coordinate, with more formal legal planning, your own efforts in finding substitute caregivers.**

Locating Legal Assistance

- **Before making formal arrangements to provide for the long-term care of your pet, seek help from professionals who can guide you in preparing legal documents that can protect your interests and those of your pet.**
- **You must keep in mind the critical importance of making advance personal arrangements to ensure that your pet is cared for immediately if you die or become incapacitated.**
- **The formalities of a will or trust may not take over for some time.**

Requesting a Pet be Euthanized Upon a Pet Owner's Death

- **Being concerned about what will happen to your pet after your death is normal.**
- **But some people take this concern to extremes, requesting that their pet be euthanized out of fear that no one else will care for the animal appropriately.**
- **When an owner puts this request in his will, that provision is often ruled invalid by the legal system when the animal is young or in good health and when other humane alternatives are available.**
- **There are some cases when euthanasia may be appropriate.**
- **If a pet is very old or requires extensive treatment for a health condition, for example, it may be unfair to both the pet and your designated caregiver to insist on indefinite care.**
- **That's why it's important to choose a responsible caregiver and thoroughly discuss the animal's condition and needs so that the caregiver can make the best decision after you're gone.**

Final Comments

- **Awareness** about this issue is the first step in helping our animal companions.
- **Educating pet owners** will help prevent animals from unnecessary euthanasia and provide pet owners with peace of mind.





2nd Chance 4 Pets

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