

Template: Pet Succession Plan

A pet succession plan is part of broader estate planning, directing what happens to a pet after the owner's death. It is typically documented in a Will or through a pet trust, ensuring legal transfer of ownership, allocating funds for the pet's ongoing care, and sometimes naming a charity or backup caregiver. The succession plan provides formal, legally binding instructions for the pet's long-term care as part of the owner's inheritable assets, and is enforceable by courts or trustees.

This Pet Succession Plan Template is designed to clearly document who will care for your pet, how finances will be managed, and what specific care instructions should be followed, ensuring your beloved pet continues to receive the care they deserve.

1. Pet Owner Information

Name:

Address:

Date of Birth:

2. Pet Details

Name(s):

Species/Breed:

Age/Date of Birth:

Microchip/ID Number (if any):

Medical conditions/special needs:

3. Carer Appointment

I hereby appoint:

Primary Carer

- Name: _____
- Relationship to you: _____
- Address: _____
- Contact Information: _____

Backup Carer

- Name: _____
 - Relationship to you: _____
 - Address: _____
 - Contact Information: _____
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3. Financial Provision

To ensure my guardian is not financially burdened and that my pet's needs are met, these provisions are included within my Will (see Clause [Clause Number, if known]):

☐ Legacy Gift: I have left a gift of \$[Amount] to the appointed carer for the specific purpose of caring for [Pet's Name].

☐ Testamentary Trust: I have established a formal trust managed by my Trustee, [Trustee's Name], who will distribute funds to the carer for all costs associated with [Pet's Name]'s care.

☐ Legacy Programme: I have made a bequest to [Name of Charity, e.g., RSPCA NSW] to enrol [Pet's Name] in their lifetime care program.

- Person responsible for managing funds: _____
 - Backup financial manager (if needed): _____
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4. Care Instructions

- Daily routine and feeding schedule:
 - Medication and health care needs:
 - Exercise, play, and socialisation needs:
 - Grooming preferences and schedule:
 - Behavioural notes or special care considerations:
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5. Veterinary Authorisation

- Regular veterinarian's name and contact: _____
 - Permission granted to carers to seek veterinary care and make medical decisions on behalf of pet (tick one):
[] Yes [] No
 - Specific instructions for medical treatment or limitations:
 - Emergency veterinary contacts:
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6. My Final Wishes

It is my sincere wish that **[Pet's Name]** lives a long, happy, and healthy life in a loving home. I trust my appointed executor and carer to honour this plan with compassion and responsibility.

Additional Notes

7. Signatures

Testator (Pet Owner): _____

Date: _____

Witness 1 Name: _____

Signature: _____

Date: _____

Witness 2 Name: _____

Signature: _____

Date: _____

Notes:

- Keep these documents updated regularly and ensure all appointed parties have copies.
- Discuss these plans clearly with carers and executors to confirm willingness and understanding.
- Seek legal advice to integrate this plan with your Will or trust documents.

Witnessing Requirements:

- The Will and all attached plans (including this Pet Succession Plan) must be signed by you (the testator) in the presence of at least two witnesses present at the same time.
- The witnesses must be adults (18+) and mentally competent.
- Witnesses cannot be beneficiaries under the Will (to avoid conflict of interest) or their spouses/domestic partners.
- Witnesses must sign the document in your presence, confirming that you signed voluntarily and with testamentary capacity.
- Each page of a multi-page Will or plan should be signed or initialed by the testator and witnesses using the same pen.

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